



*Drama*Directory

Your guide to European TV Drama Commissioning Editors and Buyers


**2015
UPDATE**



Creative
Europe
MEDIA

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Offices in Dublin and Galway.

Project Management: Orla Clancy,
Eibhlín Ní Mhunchaile
Designed by: Lir Mac Cárthaigh

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Lir Mac Cárthaigh



INTRODUCTION

The European network of Creative Europe Desk MEDIA offices is delighted to publish this updated 2015 edition of the Drama Directory, a Guide to European TV Drama Commissioning Editors and Buyers.

The Guide is intended as a tool for TV producers in search of co-financing or TV sales for their Drama projects. In particular we hope it will be of assistance to potential applicants of the Creative Europe MEDIA Television Programming support scheme which requires a minimum of three pre-sales to European Broadcasters and a clear distribution strategy for circulation in Europe and beyond.

The production of this Drama Directory is a true European collaboration with each Creative Europe Desk providing the information on the TV Market and the TV Channels in its own territory.

We would also like to take this opportunity to thank the participating Broadcasters for their generosity in providing the information contained in this Directory and the European Audiovisual Observatory for allowing us to use information from the MAVISE database.

We hope the Drama Directory will continue to be a useful resource for Television Drama Producers and Broadcasters alike. We welcome your feedback and suggestions for future editions.

THE CREATIVE EUROPE DESKS – MEDIA OFFICES





AUSTRIA

The public service broadcaster's channels ORF1 and ORF2 had a combined average audience market share of 35.3%. In 2011, the channel "ORFIII Kultur und Information" (specialised on culture, history, Europe) was introduced, as well as the sports-channel ORF Sport +. The main German private channels (RTL, Sat1 Österreich, ProSieben Austria und Vox) had a combined market share of 20.6%. German public service channels had a combined audience market share of around 13%. The main private Austrian channel is ATV with a market share of 3.3%, followed by Puls 4 (3%). (Audience data source: *Eurodata TV Worldwide / AGTT / GfK Teletest*).

Half of the 3,55 million TV households receive Satellite television, followed by 44% connected to cable TV, only half of which is digitised. IPTV and DVB-T households each make up 6% of the total number of TV households. The degree of digitisation in December 2012 was 77%. Digital terrestrial television provides the following national channels: ATV, ATV2, ORF1, ORF2, ORFIII, ORF Sport +, PULS 4, Red Bull TV, Servus TV and 3sat. There are 18 regional and local stations. The new pay-DTT platform Simpli TV marked the introduction of DVB-T2 technology in Austria (2013). The biggest cable operator is UPC, with 535 000 subscribers. Digital satellite packages are provided by ORF, Sky Österreich, Austria Sat, HD Austria. IPTV platforms are A1 TV in Vienna by A1 Telekom Austria AG (210 000 subscribers) and the platform TV-Box operated by MyPhone Austria GmbH.



Madame Nobel (c) 2014 Monafilm. Supported by Creative Europe-MEDIA, Funding Scheme: TV Programming. Directed by Urs Egger.

ORF

ORF is an independent public service broadcasting corporation. It has four national TV channels: ORF1, ORF 2, ORF III, ORF Sport+, four national and nine regional radio stations, all financed by license fees and advertising. The TV channels are complementary and are transmitted by terrestrial network as well as satellite in collaboration with 3sat.

ORF-Zentrum
Würzburggasse 30
A-1136 Wien, Austria

T: +43 1 87878 0
F: +43 1 87878 13732
kundendienst@orf.at

www.orf.at

ORF III Fernsehprogramm-Service GmbH
Nonntaler Hauptstraße 49d
A-5020 Salzburg, Austria

Dr. Heinrich Mis
Head of Drama, ORF 1
heinrich.mis@orf.at
+43 1 87878

Mag. Katharina Schenk
**Head of Development, Senior
Producer Series & Films, ORF 1**
katharina.schenk@orf.at
+43 1 87878

Dr. Andrea Bogad-Radatz
**Senior Vice President Films and
Series, ORF 1 & 2**
andrea.bogad-radatz@orf.at
+43 1 87878

Peter Schöber
Programme Director
peter.schoeber@orf.at
+43 1 87878

Mag. Klaus Lintschinger
Head of Features, ORF 1
klaus.lintschinger@orf.at
+43 1 87878

Mag. Alexander Vedernjak
Head of Series, ORF 1
alexander.vedernjak@orf.at
+43 1 87878

Mag. Irene Heschl
Head of Films and Series, ORF 1 & 2
irene.heschl@orf.at
+43 1 87878

Thomas Kaiserseder
Acquisitions
thomas.kaiserseder@orf.at
+43 1 87878

AUSTRIA



SERVUSTV

ServusTV
Ludwig-Bieringer-Platz 1
A - 5073
Wals-Himmelreich
Austria

T: +43 662 842244 - 0
F: +43 662 842244 - 28181

www.servustv.com

Matthias Hartmann
Director of Programming
+43 662 842244 – 28120

Frank Aydt
Acquisitions
+43 662 842244 – 28100

AUSTRIA



PULS 4

PULS 4 TV GmbH & Co KG
Media Quarter Marx 3.1
Maria Jacobi Gasse 1
A-1030 Wien
Austria

T: +43 1 999 88 - 0
F: +43 1 999 88 - 8888

www.puls4.com

Oliver Svec
Programme Director
oliver.svec@prosiebensat1puls4.com

DI (FH) Thomas Gruber
Deputy Programme Director
thomas.gruber@prosiebensat1puls4.com
+43 / 1 / 368 77 66 - 404
+43 / 1 / 368 77 66 - 199

Birgit Moser-Kadlac
Consultant to Programme Director
Birgit.Moser-Kadlac@prosiebensat1puls4.com
+43 1 36877 66250

AUSTRIA



ATV UND ATV2

ATV und ATV2 - ATV Privat TV GmbH & Co
KG Aspernbrückengasse 2
A-1020 Wien
Austria

T: +43 1 213 64-0
F: +43 1 213-64-999
atv@atv.at

www.atv.at

Martin Gastinger
**CEO-Programme Director and
Development**
+43-1-213 64-0

Roman Rinner
**Head of Programme-Planning and
Acquisitions**
+43-1-213 64-0

AUSTRIA

BELGIUM

The three Communities (Flemish, French and German speaking) each have responsibility for audiovisual communication and constitute separate markets, the common feature being the fact that all three markets have been extensively cabled for three decades and are thus able to receive the channels of neighbouring countries. They each have their own systems of regulating the audiovisual media and their own public service broadcasters, namely the VRT, the RTBF and the BRF respectively.

The main players in the Flemish Community are VRT, which operates the public channels Één, Canvas and Ketnet/OP12, and Mediahuis (Vlaamse Media Maatschappij), which runs the channels VTM, 2BE, Anne, Jim, vtmKzoom and Vitaya. Één (VRT) continues to dominate the market, with a steadily rising daily audience share of 31% in 2013, a slight decrease compared to 2010 (33%) which reached 33% in 2010 (compared with 28.7% in 2006). Behind Één in audience terms are the channel VTM (17.4% in 2013) and the second public channel Canvas (children's programmes during the day sports and cultural programmes in the evening), followed by Vier, 2BE and Vijf. The rest of the market is split between a number of special interest channels set up in the Flemish Community as well as French and Dutch language channels.

In the French Community (which now refers to itself as the "Federation Wallonie- Bruxelles"), the main operators of television channels are, apart from RTBF (La Une, La Deux and La Trois), the RTL group, with its three channels RTL-TVI, Club RTL and Plug RTL that target Belgium but operate under Luxembourg law, and the French group AB (AB3, AB4 and AB Shopping). RTBF's market share rose slightly in 2012 (20.9% compared with 20.5% in 2011). RTL-TVI continues to dominate the market with a 20.1% daily audience share in 2012 (19.2% in 2008) and a prime time market share of 28%. The second most important Belgian channel is La Une (RTBF), with a 14.6% market share. La Deux once again exceeded the 5% mark (5.4% compared with 4.8% in 2011). The other Belgian channels have a combined share of less than 5% (Club RTL, La Deux, AB3, etc) and a significant number of viewers still turn to the French channels, which command about a third of the audience share.

In the German speaking Community, the majority of the population (about 74 000 inhabitants) choose mainly to watch the German television channels.

Almost 100% of Belgian households subscribe to pay TV cable TV, mainly due to the extent of the country's cable network. The country's primary cable operator, Telenet (58% of which is under the ownership of Liberty Global since January 2013), claims more than 2.1 million subscribers to its range of channels. The other cable operators are Brutélé, Tecteo (under the VOO brand) and Numericable/Coditel. The market has undergone significant concentration in the last four years, with the number of cable operators falling from 19 in 2006 to just 6 in 2012. Since January 2013, the service of AIESH has been replaced by that of Numericable. In July 2011, the IBPT (the federal telecommunications services authority) adopted a plan to open up the cable network. This states that cable operators will in future have to enable any interested parties to make a bid to offer television services or high speed Internet services using the networks of the major cable operators.

SOURCE: MAVISE Database
– a database provided by
the European Audiovisual
Observatory on behalf of the
DG Communication of the
European Commission.



The Spiral. Produced by Caviar, Belgium. Developed with the support of the MEDIA Interactive support scheme.



BTV (BELGIUM TELEVISION SA)

Created in 2011, BTV operates 2 generalist channels totalling a 5.1% market share in the South of Belgium. AB3 is devoted to fiction (67%) and entertainment for an audience aged 15-34 year old. AB4 focus on fiction (59%) like cult movies and classical series towards an older audience (35+).

AB3 – AB4
7 rue de Livourne
1060 Bruxelles
Belgium

T: +32 2650.09.20
F : +32 2 646.07.12
info@ab3.be

www.ab3.be

Mr Rolland BERDA
Managing Director

Mr Philippe ZRIHEN
Head of programming
Philippe.zrihen@ab3.be

BELGIUM



BETV

Owned by cable operator Tecteo, BeTV offers a digital package of thematic channels (pay TV), Be Premium, including cinema (Be1, Be Ciné), series (Be Series) and sports (Be Sport 1, 2 and 3). It also distributes specialized services (Be Enfant, Be Documentaires, Be Charme) as well as a VoD catalogue. 61% of the programming on Be1 is made of films. Most of its acquisitions come from Canal + France.

Chaussée de Louvain 656
B-1030 Brussels
Belgium

T: +32 2 730 02 11
F: +32 2 732 18 48
info@betv.be

www.betv.be

Mr Frédéric Vandeschoor
Managing Director

Mr Christian Loiseau
Head of Programming
Christian.loiseau@betv.be

Mr Philippe Logie
Head of Acquisition
philippe.logie@betv.be

BELGIUM (FRENCH-SPEAKING)



RTL-TVI – CLUB RTL – PLUG TV

RTL, a subsidiary of CLT-UFA/RTL Group, operates 3 channels in French-speaking Belgium with a 30% market share. RTL-TVi is a generalist channel combining news programmes, entertainment, commercial films and series (mainly American). Until recently, Club RTL was focused on niche programme for kids, series and films but now it plans to go more mainstream. Plug addresses young adults with series, cult movies, reality shows and music programmes.

Avenue GeorGIN 2
B-1030 Brussels
Belgium

T: +32 2 337 68 11
F: +32 2 337 68 12

www.rtl.be

Stéphane Rosenblat
Director of Programmes
stephane_rosenblatt@clt-ufa.com

Patrick Van Den Bosch
Head of Acquisitions
pvandenbosch@rtl.be

Erwin Lapraille
Deputy Director TV
elapraille@rtl.be

BELGIUM (FRENCH-SPEAKING)

RTBF

RTBF, the public broadcaster in the French-speaking community, operates 3 channels: la Une, la Deux, la Trois. La Une is focused on information, entertainment and generalist programmes. La Deux is more oriented towards series and sports. La Trois is a children's channel in the daytime and a more cultural one (documentaries & films in original version) in the evening.

Boulevard A. Reyers 52
B-1044 Brussels
Belgium

T: +32 2 737 25 44
F: +32 2 737 43 81

www.rtbf.be

François Tron
Director of Programmes
dirty@rtbf.be
+3227374633

Arlette Zylberberg
Head of Fiction
azy@rtbf.be
+322 7372504

Anne Leduc
Commissioning Editor Fiction
aled@rtbf.be

Eric Poivre
Head of Programming
epo@rtbf.be
+3227372546

Valérie Lardinois
Films & Fictions Acquisitions
vall@rtbf.be
+322 7374831

BELGIUM (FRENCH-SPEAKING)



ACHT TV

Acht TV is a Dutch language Pay TV Fiction channel broadcasting mainly HBO programming.

Acht
Bites Europe NV
Bloemenstraat 32
1000 Brussel

T: +32 2 211 05 10
vragen@acht.tv

www.acht.tv

Vincent Loozen
Sales and acquisition manager
(Netmanager)
vincent@acht.tv
+32 2 211 05 10

BELGIUM (FLANDERS)



VRT ÉÉN

VRT is Belgium's Dutch-language public broadcaster of the Flemish community in Belgium. VRT consists of the family entertainment channel Één, the youth channel Ketnet and Canvas, which is an informative and cultural channel with a strong documentary profile.

Auguste Reyerslaan 52,
1043 Brussels,
Belgium

T: 32 2 7413 111
F: 32 2 7349 351

www.vrt.be

Reinhilde Weyns
Head of Acquisitions
reinhilde.weyns@vrt.be
VRT CANVAS

Steve De Coninck-Deboeck
Programme Manager
steve.deconinck-deboeck@vrt.be

Telidja Klai
Programme manager & Acquisitions
VRT KETNET
telidja.klai@vrt.be
+32(2)741-5304

BELGIUM (FLANDERS)



VRT (VLAAMSE RADIO- EN TELEVISIEOMROEP) CANVAS

VRT is Belgium's Dutch-language public broadcaster of the Flemish community in Belgium. VRT consists of the family entertainment channel Één, the youth channel Ketnet and Canvas, which is an informative and cultural channel with a strong documentary profile.

Auguste Reyerslaan 52,
1043 Brussels,
Belgium

T: 32 2 7413 111
F: 32 2 7349 351

www.canvas.be

Sven Van Lokeren
Acquisition Executive (Series)
sven.vanlokeren@vrt.be
+32 2 7415981

Catherine Wilmes
Acquisition Executive (Film)
catherine.wilmes@vrt.be
+32 2 7413315

BELGIUM (FLANDERS)



SBS BELGIUM

VIER is a private tv-channel with national coverage in Belgium, focusing on the Flemish (Dutch speaking) community. The target group is VVA 18-54. VIER offers free tv and broadcasts 168 hours per week. VIJF is, like VIER, also a part of SBS Belgium and is a lifestyle free tv channel focusing on women between 20 and 49 years old. SBS Belgium is part of the bigger De Vijver Media structure.

Harensessteenweg 228,
1800 VILVOORDE
Belgium

T: 02/715.11.50
F: 02/720.70.96
info@sbsbelgium.be

VIER.be
VIJF.be

Stefanie Segers
Acquisition & Distribution Manager
Stefanie.segers@sbsbelgium.be
+32 2 715 11 99.

BELGIUM (FLANDERS)



MEDIALAAN

MEDIALAAN runs the channels VTM, 2BE, JIM, Vitaya (focused on women), VTMKzoom and Anne.

Medialaan 1,
1800 Vilvoorde
Belgium

T: +32 022 55 32 11
F: +32 022 55 51 41

www.vtm.be
www.2be.be

Ricus Jansegers
Netmanager and Head of Drama
ricus.jansegers@medialaan.be

Davy Parmentier
Pitches entertainment
davy.parmentier@medialaan.be

Jan Creuwels
Scenario, pitches drama
jan.creuwels@medialaan.be

Luc Janssens
Foreign acquisitions manager
luc.janssens@medialaan.be

BELGIUM (FLANDERS)



BULGARIA

In Bulgaria the private channel bTV (Central European Media Enterprises) dominates the market and had a daily audience market share of 36.3% in 2012. BNT, the public broadcaster now has four television channels and a total audience share of 8.5% (less than half the share it had in 2006). The other major commercial player is the Modern Times Group with Nova TV (14.9%). (Audience data source: Eurodata TV Worldwide / TNS TV Plan).

Approximately 30% of Bulgarian homes receive cable television with over 600 cable network operators. In 2010, the private equity company EQT V took over two major operators: Cabletel and Eurocom establishing a new service called Blizoo. The service had 440 000 subscribers in 2013. In 2010 Telekom Austria (via Mobiltel) bought into the Bulgarian market (acquiring Megalan and Spectrum).

The Bulgarian satellite market has witnessed several major changes in the last year. Satellite BG closed down in June 2013 due to the economic crisis. The service had about 50 000 customers and they were recommended by Satellite BG to move to Vivacom. The main players in the market are Bulsatcom and Vivacom TV (from Telecom operator Vivacom). A new service was launched in 2013 by Neterra and Telenor called W1. There are also at least 15 IPTV services available, mostly provided by local ISPs, with the most important provided by Mobiltel (Telekom Austria).

Regarding DTT in Bulgaria there were tenders in 2009 and 2010. Two companies were selected: Towercom (Slovak Republic) to operate two nation-wide DTT multiplexes; and Hannu Pro (Latvia) to operate three nation-wide DTT multiplexes and the public service multiplex. Complaints against this decision led to the opening of infringement proceedings by the European Commission regarding the tender process including the restrictions on who could enter the tender. The two operators have continued the development of DTT services. Switch-off was reported to have taken place in September 2013. However, such a large number of homes were unprepared and left without television signals that the switch-off was delayed until November 2013. Low income homes were provided with vouchers to help in the purchase of DTT equipment.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



TV7

TV7 is a Bulgarian polythematic television channel with a national coverage. It is the main channel in the group of channels TV7, NEWS7 and SUPER7 which starts its broadcasting at the end of 2005. Since 2013 the program of the television is being processed digitally on the territory of the whole country while reaching 96.2% of population coverage.

TV7
159, Tzar Boris III Blvd.
Sofia 1618

T: +359 2 816 27 40
office@tv7.bg

www.tv7.bg



BULGARIA



bTV

bTV is the first private national TV station in Bulgaria.

bTV's program was broadcast for the first time on June 1st 2000, those breaking the monopoly of the public national TV station and changing entirely the media environment in Bulgaria. For 12 years bTV firmly established itself as the most watched TV channel in Bulgaria with nearly 40% share of all viewers and with leading positions on the advertising market.

bTV
National Palace of Culture
1, Bulgaria Sq.
Sofia 1463

T: +359 2 9176800
sales@btv.bg

www.btv.bg



BULGARIA



NOVA TV

In 2008 NOVA TV became part of Modern Times Group (MTG). At the beginning 2011 NOVA, DIEMA, DIEMA 2 и DIEMA FAMILY, NOVA SPORT, TV 1000 Balkan, Viasat History, Viasat Explore и Viasat Nature, as well as EVA magazine became part of the established Nova Broadcasting Group. The expansion continues in 2013, when the company became owner of 70 % of Darik Net and all web sites of Darik web together with the biggest digital media company in the country Netinfo.

NOVA TV
41, Hristophor Columb Blvd
Sofia 1592

T.+ 359 2 805 00 00
sales@ntv.bg

www.novatv.bg



BULGARIA



BNT

The Bulgarian National Television (BNT) was founded in 1959 and it was the first television service to broadcast on the territory of Bulgaria. As a public service broadcaster, the main purpose of BNT is to deliver a broad range of news and programming that keeps its audience informed about important issues and events in the areas of politics, economics, business, culture, science and education. BNT operates four regional production centres in the cities of Blagoevgrad, Varna, Plovdiv and Rousse. In 1999, BNT launched the satellite channel 'TV Bulgaria' designed mainly for Bulgarians living abroad. At the end of 2010, the channel was renamed 'BNT World'. Channel BNT2 was launched in 2011. It pooled together the programming of the four regional centres. It is available free-to-air in the major cities in Bulgaria. BNT gives its viewers the benefit of emerging communications technologies and services and it was one of the earliest Bulgarian Media on the 'World Wide Web'.

BNT
29, San Stefano Str
1504 Sofia

T. +359 2 814 2210

www.bnt.bg



CYPRUS

The Cypriot public service broadcaster CYBC continues to play an important role in the market with four channels: RIK1, RIK2, RIK HD and RIK Sat. These had a combined daily audience share of 17.4% in 2012, a slight increase from the year before. The national private channels are very strong with the most important being Sigma (18.4%), ANT1 (16.2%) and Mega (14.4%), followed by Plus TV (3.9%).

(Audience data source : Eurodata TV Worldwide / AGB Nielsen Media Research Cyprus).

Several channels are the Cyprus versions of major Greek commercial channels including ANT1, Mega, and the new sister channel of a Greek commercial station which was launched in 2011 (Mad Cyprus). Cyprus is also home to a number of Russian language channels that target Russia and the Baltic states.

Analogue terrestrial signals were switched off on 1 July 2011, after a short transitional period. The network was launched in spring 2010 with the multiplex operated by the public broadcaster and composed of public channels. At the beginning of 2011, the private consortium Velister Ltd (consisting of six private broadcasters and the distributors Primetel and Cablenet) launched a second multiplex, dedicated to private channels. In 2013, Velister was broadcasting nine free channels and a pay- DTT package composed of six channels and produced by LTV (Lumiere TV).

The transition to DTT had a strong impact on the local television landscape in Cyprus. In the absence of a local DTT network, several local stations have begun to broadcast nationally (Extra TV Limasol and Capital TV) in some cases with a revised programme schedule, while others have had to cease broadcasting either temporarily or permanently.

The only satellite package available in Cyprus is Nova, operated by the Greek firm Multichoice Hellas (subsidiary of Forthnet). Only around 5 000 homes paid for satellite subscription services in 2012. The main cable operator is Cablenet and the company has faced competition since 2010 with the launch of two cable TV packages by LTV (Lumiere TV): LTV Cable and LTV3Play. Approximately 12% of homes in Cyprus subscribe to cable packages. Cablenet claimed to have 30 000 subscribers in 2012. Two IPTV services are available: from Cytavision and Primetel. Almost 20% of homes opted for IPTV services in 2012.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



CYPRUS BROADCASTING, CORPORATION (CYBC)

CyBC is a generalist channel broadcast by the Cyprus Broadcasting Corporation. It has national coverage and is broadcast in Greek. It is a free HD public channel, broadcast over the DTT network.

PO BOX 24824
1397 Nicosia
Cyprus

T: +357 22862000
F: +357 22314050

www.cybc.com.cy

Themis Themistocleous
**Director General Cyprus
Broadcasting Corporation**
themis.themistocleous@cybc.com.cy
T: +357 2286 2345

Evi Papamichael
**Head of Acquisitions –Television
Department**
evi.papamichael@cybc.com.cy
T: +357 2286 2412
F: +357 2231 5806

CYPRUS



ANT1 TV

Launched in 1993, Ant1 TV is an analogue terrestrial generalist channel with national coverage, broadcast in Modern Greek. The channel is free and active 168 hours per week. Ant1 TV is a sister channel of ANT1 TV (Greece). It was the first private channel to be launched after Cyprus broadcasting liberalisation.

Megaron 5, 2311 Strovolos
P.O.BOX 20923
1665 Nicosia
Cyprus

T: +357 22200200
F: +357 22200210

www.antenna.gr

Mr. George Kotziamanis
**TV Programmer/Commissioning
Editor**
g.kotziamanis@antenna.com.cy

Mr. Constantinos Odysseos
**TV Programmer/Commissioning
Editor**
odysseos@antenna.com.cy

CYPRUS



MEGA

MEGA is a private Digital terrestrial channel – a sister channel of one of the main Greek commercial stations. It is a generalist channel broadcasting in modern Greek.

Mega Channel

Address: Patriarchi Petrou Z' No. 15,
2054 Strovolos – Nicosia
Cyprus

Mr. Giorgos Chouliaras

TV Program Commissioning Editor

g.chouliaras@megatv.com.cy

T: +357 22 477700

F: +357 22 477737

Ms. Riana Odysseos

TV Program Commissioning Editor

r.odysseos@megatv.com.cy

T: +357 22 477955

F: +357 22 477737

CYPRUS



SIGMA TV

Sigma TV is the main private TV channel in Cyprus and main TV channel in Cyprus in terms of audience. SIGMA has a programmes deal with the Greek channel Star Channel. Sigma targets mainly young urban adults. SIGMA prime time schedule is composed of local (40%) US (25%), mainland Greek (15%) and other (20%) programming. It has free national coverage, active 168 hours a week and is broadcast in Modern Greek.

P.O.BOX 21836,
1513 Nicosia
Cyprus

T: +357 22580100
F: +357 22580221

www.sigmatv.com

Mrs Soulla Ioakeimidou
**TV Programmer/Commissioning
Editor**
soulla@sigmatv.com

Mr. Alexis Nicolaou
**TV Programmer/Commissioning
Editor**
alexis@sigmatv.com

Ms Eliza Vlachou
Foreign Programme Manager
vlachou@sigmatv.com

CYPRUS



CZECH REPUBLIC

In the Czech Republic, the television market continues to be dominated by the private channel Nova TV (Central European Media Enterprises), which in 2014 had a market share of 31.98 %. The public service broadcaster Czech Television, had a total market share of 29.86 % thanks to the growth of CT24, CT4 and CT :D / CT art. In third place is the private channel Prima TV (Modern Times Group), which had a share in 2014 of 21.54 %. (Audience data source: ATO)

All the main operators have launched additional channels over the past 10 years. The Nova TV family channels include Nova Sport and Nova Cinema and the male oriented channel Fanda launched in 2012. The public service broadcaster has a sport and a news channel (CT 4 Sport and CT 24) and a channel split during the day between programme for children and art programme (CT :D / CT art). Prima TV also has two entertainment channels: Prima Cool targeting men, and Prima Love, which targets women.

Analogue terrestrial television was switched off in June 2012. Digital Terrestrial Television is the most important distribution platform in the Czech Republic serving more than 34% of homes in 2013. IPTV has taken off in the Czech Republic with 5 big competing offers.

On 6 September 2011 the Parliament of the Czech Republic adopted amendments to audiovisual legislation that concern advertising and teleshopping in public television. From January 2012 advertising was removed from the channels CT1 and CT24 (News). The other channels will continue to have advertising but the time allocated to advertising on CT2 and CT4 should not exceed 0,5% of the daily broadcasting time.

ČESKÁ TELEVIZE (CZECH TELEVISION)

Česká televize is Czech public service broadcaster. It is financed mostly from television licence fees, partly from business activities. It broadcasts on six channels: ČT1, ČT2, ČT24 (news channel), ČT sport (sport channel) and the newly launched ČT :D (children channel) and ČT Art (culture channel). While ČT1 is a family-oriented channel showing original Czech movies, series, entertainment and lifestyle, ČT2 offers documentaries, nature-oriented shows and foreign films and series. ČT :D is a children's educational channel, launched 31. 8. 2013, which broadcasts from 6am until 8pm. ČT art is a channel focusing on culture, theatre, operas, music, art films, launched 31. 8. 2013, which broadcasts from 8pm until late night.

Kavčí hory
140 70 Praha 4
Czech Republic

T: +420 261 131 111
F: +420 2 6113 7308

www.ceskatelevize.cz

Jan Maxa
**Director, Department of
Programmes and Formats
Development**
jan.maxa@ceskatelevize.cz

Václav Kvasnička
Head of Acquisitions Department
vaclav.kvasnicka@ceskatelevize.cz

Alena Poledňáková
Head of Acquisitions – Drama
alena.polednakova@ceskatelevize.cz

Markéta Štinglová
**Manager of International Content
Projects Center**
marketa.stinglova@ceskatelevize.cz

CZECH REPUBLIC



TV NOVA

CET 21 is a private broadcaster which broadcasts on several channels: Nova (private channel with the biggest market share), Nova Cinema, Nova Sport (sport channel), MTV Czech Republic, Fanda, Smíchov and Telka. The programming of Nova is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Nova Cinema offers mostly feature films and TV series.

CET 21, spol. s r. o.
Kříženeckého náměstí 1078/5
152 00 Praha 5
Czech Republic

T: +242 464 111

tv.nova.cz

Alexandra Ruzek
**Director of Programming and TV
Channels**
alex.ruzek@nova.cz

Alexandra Bezpalcová
Head of Acquisitions
alexandra.bezpalcova@nova.cz

Petra Bohuslavová
Acquisitions
petra.bohuslavova@nova.cz

CZECH REPUBLIC



PRIMA TV

FTV Prima is a private broadcaster which broadcasts on four channels, Prima, Prima COOL, Prima Love and Prima ZOOM. Prima's programming is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Prima COOL is an entertainment channel broadcasting mainly American films, TV series, sport and entertainment programmes. Prima Love is a channel targeted at women, broadcasting films, TV series and talk shows. Prima ZOOM is a new channel, launched 1. 2. 2013, broadcasting mainly foreign

documentaries.

FTV Prima, spol. s r. o.
Na Žertvách 24/132
180 00 Praha 8 - Libeň

T: +420 266 700 111

www.iprima.cz

Jan Rudovský
Head of Aquisition
jan.rudovsky@iprima.cz

CZECH REPUBLIC



HBO CZECH REPUBLIC

HBO Czech Republic is the Czech subsidiary of Home Box Office (HBO). It is transmitted by cable and satellite networks and it broadcasts mostly feature films, TV series and documentaries. It operates several channels: HBO, HBO2, HBO Comedy, Cinemax and Cinemax2.

Jankovcova 1037/49
170 00 Praha 7
Czech Republic

www.hbo.cz

Jana Malířová
**Head of Acquisition and Business
Affairs**
jana.malirova@hbo.cz
+420 261 094 500

CZECH REPUBLIC



DENMARK

Denmark is the only European market in which public channels, operated by the two public broadcasters, DR and TV 2, still attract more than half of average daily audiences. The TV 2 channel continues to dominate the market (23.5% of daily audiences in 2014), followed by DR1 (22.4%). The two main public channels therefore account for 45.9 % of average daily audiences in 2014. Because of the creation of various special-interest channels, the entire public owned channels saw their total audience grow from 65.6% in 2010 to 69% in 2014. The most popular private channel is TV3 (Swedish MTG Group), with a daily market share of 4.5%. The other main private channels are Kanal 5 (Discovery Networks Denmark, 3.5% daily audience share) and TV3+ (MTG Group), whose daily audience share was 2.8% in 2014. (Audience Data Source: TNS Gallup – TV-Meter).

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



The Legacy II (Photo: Per Arnesen). Produced by DR Fiction



Norskov (Photo: Adam Wallensten). Produced by
SF FILM PRODUCTION for TV 2 Danmark A/S

DR TV

DR (Danish Broadcasting Corporation) is Denmark's oldest and largest electronic media enterprise. The corporation was founded in 1925 as a public service organization and the TV channel in 1951. DR does not possess any RTB license but has signed a public service contract with the Ministry of Culture. The channel is completely financed by public revenues (there are no advertising revenues). DR TV comprises two channels, DR1 and DR2 - and four new channels from November 2009: DR K (Culture, history, music), DR Ramasjang and DR Ultra (Children's programming) and DR3 (Youth). Over the years DR has built up a strong fiction brand, especially on Sunday evenings at 20h. DR has produced a number of award winning TV series, such as The Legacy (2014-2015), The Bridge (2011, 2013), Government (2010-2013), The Killing (2007-2012), The Protectors (2009), Unit One (2000-2001), Nikolaj & Julie (2003), The Eagle (2005) and Young Andersen (2005).

DR
Emil Holms Kanal 20
DK – 0999 Copenhagen C
Denmark

T: +45 3520 3040
dr@dk.dk

www.dr.dk

Pil Gundelach Brandstrup
CEO DR 1
pibr@dr.dk
+45 3520 8305

Steen Salomonsen
Head of acquisitions, Fiction
ssa@dr.dk
+45 3520 3929

Flemming Hedegaard Larsen
Editor DRK
fhl@dr.dk
+45 3520 4089

Flemming Hedegaard Larsen
Acting Editor in chief, Children and youth

Piv Bernth
Head of Drama
pvb@dr.dk
+45 3520 4240

Bertel Kaare Schmidt
Editor, TV series
kash@dr.dk
+45 3520 4019

Jonathan Herrik
Editor, fiction DR
johe@dr.dk
+45 2854 0754

Helene Auro
Sales Director, DR Sales
heau@dr.dk
+45 3520 3957

Ditte Christiansen
Co-producer, Fiction
dich@dr.dk
+45 3520 4222

Inge Kastoft
Program coordinator
ika@dr.dk
+45 3520 4040

Irene Strøyer
Channel Controller, DR3
ires@dr.dk
+45 2854 3377

DENMARK

TV2

TV 2 DANMARK A/S is owned by the Danish state and the Public Service channel TV 2 is operated on a commercial basis. Until 2004, TV 2's main channel received a smaller share of the license fees. Since 2012, the main channel TV 2 has been partially funded by subscription. TV 2's overall share (20-60) is 24.1% and the commercial share (20-60) is 38.9% (2014). TV 2 has five subsidiary stations known as TV 2 ZULU, targeted at youth, TV 2 CHARLIE, oriented towards older audiences, TV 2 FRI (leisure channel), TV 2 NEWS, TV 2 SPORT, as well as the on-demand service TV 2 PLAY. In recent years TV 2 has aired a number of successful Danish TV fiction series, such as Anna Pihl (2006-2008), Park Road (2009-2010), Dicte (2013-2014), The Seaside Hotel (2013-2015), RITA (2011-2015) and Norskov (fall 2015) (all MEDIA supported).

TV2/Danmark (Odense)
Rugårdsvej 25, 5100 Odense C, Denmark

T: +45 6591 9191 (Odense)
T: +45 39 75 7575 (Copenhagen)
F: +45 6591 3322 (Odense)
tv2@tv2.dk

www.tv2.dk

TV2/Danmark (Copenhagen)
Teglholm Allé 16, 2450 Copenhagen SV
Denmark

Lotte Lindegaard
Head of Channel
loli@tv2.dk

Anette Rømer
Head of Acquisitions and Formats
anro@tv2.dk

Sune Roland
Head of TV 2 Networks (ZULU, Charlie and FRI)
suro@tv2.dk

Anders Leifer
Senior Acquisitions Executive
leif@tv2.dk

Thomas Breinholt
Head of Programme
thbr@tv2.dk

Katrine Vogelsang
Head of Fiction
kavo@tv2.dk

Jesper Nilausen
Commissioning Editor and Buyer (fast turnaround doc. and current affairs)
nila@tv2.dk

Lars Erik Nielsen
Acquisitions Executive
leni@tv2.dk



TV3 DENMARK

TV3 is one of the channels owned by the Viasat Corporation. They are broadcasting from the UK. There are a number of sister channels like TV3+, TV3Puls, TV3 Sport 1, TV3 Sport 2 and more. The last few years TV3 has started to include Danish TV fiction in their schedule and have had success with co-producing fiction series such as Lullu – The Bankrobber's Wife (2009).

MTG TV A/S
Strandlodsvej 30
DK-2300 København S

T: +45 77 30 55 00
F: +45 77 30 55 10
tv3@viasat.dk

Kenneth Kristensen
**Programme director TV3, TV3+ and
TV3 PULS**
Kenneth.Kristensen@mtgtv.dk
T: +45 7730 5500
M: +45 4046 7170

Allan Østbjerg
**Head of scheduling and acquisitions
TV3, TV3+ and TV3 PULS**
Allan.Ostbjerg@mtgtv.dk
T: +45 7730 5500
M: +45 4178 2557



DISCOVERY NETWORKS DENMARK

Discovery Networks Denmark is part of the Northern European branch of the global Discovery Networks International. The Northern European region includes Ireland, Iceland, Sweden, Norway, Finland, Denmark, the Benelux and the UK and serves 18 countries, comprises 28 channel brands and reaches 69 million viewers monthly. Discovery Networks Denmark comprises 12 TV channels: Kanal 4, Kanal 5, 6'eren, ID - Investigation Discovery, Eurosport, Eurosport Danmark, Canal 9, Discovery Channel, TLC, Animal Planet, Discovery World, Discovery Science and the streaming service Dplay. Recently Discovery Networks Denmark has co-produced the fantasy series Heartless (2014-2015) airing on the main channel Kanal 5.

Discovery Networks Denmark ApS
H.C. Andersens Boulevard 1
DK-1553 Copenhagen V

T: +45 7010 1010
info@discovery.com

discoverynetworks.dk

Lars Ellegaard
**Head of Factual (Local Production) –
Executive Producer Drama, Discovery
Networks Denmark**

Lars.Ellegaard@sbsdscovry.dk
T: +45 7010 1010
M: +45 3065 2770

Tina Moreton
**Head of Acquisition, Discovery
Networks Denmark**

Tina.Moreton@sbsdscovry.dk
T: +45 7010 1010
M: +45 3065 2922

DENMARK



ESTONIA

Estonia's public service broadcaster (Eesti Rahvusringhääling, ERR) operates three free-to-air advertising free television channels: ETV, ETV2 and ETV+. The new channel ETV+ focuses on Russian speaking audiences and involves different cross-media angles giving the viewers a possibility to participate in various discussions and debates. During 2013, ERR television channel ETV and ETV 2 reached in total 17,7% market share, but still gave away by 0,1% it's leader position to Kanal 2 and it's sister channels Kanal 11 and Kanal 12. Kanal 2 AS, the owner and operator of all these three commercial TV-channels belongs to Eesti Meedia AS. After management buy out in the end of 2013 from Norwegian Schibsted ASA belongs Eesti Meedia AS 100% to Estonian capital. Other main private channels on the market are TV3, TV6, 3+ and other Viasat platform channels all owned by the Swedish group MTG, and Russian language channels such as PBK, RTR Planeta and Ren TV. (Audience data source: Eurodata TV Worldwide / TNS Emor).

Cable is still the main distribution platform ahead of IPTV and DTT and satellite. The number of cable operators increased to twelve in 2011 and is dominated by three main players (Starman, STV and Telset). Starman, which is also the only pay-DTT distributor, was acquired during 2013 by Swedish group East Capital Explorer. Just a few players operate on the Estonian TV market, as there are only one pay-DTT distributor (Starman), one satellite television packager (Viasat [MTG Group]) and one IPTV provider (Elion [TeliaSonera Group]).



ESTONIAN PUBLIC BROADCASTING

Estonian Public Broadcasting has two TV channels (ETV and ETV2) and five radio stations. ETV is Estonia's biggest public service TV channel. It offers programming to all age groups viewers including a daily evening news show; education, science, culture, lifestyle, current affairs and entertainment programs and sports coverage. ETV2 – the programming consists of outstanding cultural and educational broadcasts, documentaries, TV shows and films. It has a special daily children's slot and daily news broadcast in Russian.

Gonsiori 27,
15029 Tallinn,
Estonia

T: +372 628 4100
F: +372 628 4155
err@err.ee

Katrin Rajasaare
Head of Acquisitions
katrin.rajasaaere@err.ee



KANAL 2

The group consists of Kanal2, Kanal 11 and Kanal 12. Kanal 2 programmes mainly entertainment and local series. Kanal 11 has a set target group of modern women. Kanal 12 is more action and sports oriented, with the target group set as men.

Maakri 23 a,
10145 Tallinn,
Estonia

T: +372 666 2450
F: +372 666 2451
info@kanal2.ee

Kai Gahler
Acquisitions Specialist
kai@kanal2.ee

ESTONIA



TV3

One of the channels owned by the Viasat Corporation. The group also includes sister channels TV6 and 3+. The programming is mainly entertainment with local productions and also acquisitions.

Peterburi tee 81,
11415 Tallinn,
Estonia

T: + 372 6220 200
+372 6 220 212 (Programme dept)
tv3@tv3.ee

ESTONIA



FINLAND

Finland switched to Digital Video Broadcasting (DVB) in 2007 first in Europe. Next transition to high-definition technology (DVB-T2 & MPEG4) will mean parallel SD and HD-distribution for a long time and tie up resources. Finland's national public service broadcasting company YLE's SD broadcasts may continue as long as until 2026.

All media companies in Finland are developing increasingly interactive online and mobile services. Mobile use of media content is increasing. The media sector in Finland is undergoing the global transformation. Digitisation has changed production, distribution and reception significantly. Global and Nordic service providers, such as Netflix, HBO Viaplay and Filmnet have entered the fee-based subscription video service market.

However these changes have not radically altered the balance in the broadcasting market, where the main players remain Finland's national public service broadcasting company YLE (YLE TV1, YLE TV2, YLE Teema and Swedish-language channel YLE FEM), MTV (MTV3, Sub, AVA + pay-channels) owned by Bonnier Group and the Finnish private media group Nelonen Media (Nelonen, Jim, Liv + pay-channels) owned by Sanoma Entertainment Finland Ltd.

In 2013 YLE's market share of daily television viewing was 41,9 %. YLE TV1 was the most popular TV channel in Finland (market share 26%). The second popular television channel was MTV3, its market share was 19 %. Daily television viewing in Finland in 2013, including children aged four and over, was 3 h 2 min (2012: 2 h 55 min). (Source: Finnpanel). Pay-TV share in Finland is around 600 000 households. It is around 25 % of all households in 2013. (Source: Ficom)



Mustat lesket (Black Widows), © Moskito Television/Else Kyhälä



Tellus, 2014 – Production Company: YLE, Finnish Broadcasting Company



MTV has 6 TV channels: MTV3, Sub, AVA and the MTV Channel Package, which is a pay-TV package comprising MTV MAX, MTV Fakta, MTV Leffa, MTV Juniori, MTV Sport 1, MTV Sport 2. MTV represents C More pay-TV services in Finland. MTV (MTV Oy) is owned by Nordic Broadcasting Oy, which is owned by the Swedish publisher Bonnier AB. The MTV Channel package was launched in November 2006. MTV has been representing the C More pay-TV Services since 2009. MTV also offers a AVOD+SVOD service called Katsomo.

Ilmalankatu 2
00033 MTV
Helsinki
Finland

T: +358 10 300 300

www.mtv.fi

Sarita Harma
Head of Drama
sarita.harma@mtv.fi

Hanna Kallankari
Head of Acquisitions
hanna.kallankari@mtv.fi

Olli Nikunen
Acquisition Executive
olli.nikunen@mtv.fi

Karoliina Kivijärvi
Acquisition Executive
karoliina.kivijarvi@mtv.fi

Marko Karvo
**Vice President, Channels and
Business Development**
marko.karvo@mtv.fi



NELONEN MEDIA / SANOMA MEDIA FINLAND LTD.

Nelonen Media is a strongly developing broadcasting group reaching more than 90 % of the Finns. We bring our customers quality entertainment through diverse media portfolio. Nelonen Media operates four nationwide free-to-air TV channels, five pay TV channels, four nationwide radio channels, two regional radio channels, free-of-charge VOD channel, and a SVOD service. Each channel and station have their own website which offer additional, program-related content. Nelonen Media is part of Sanoma Media Finland. Sanoma is amongst the largest media and learning companies in Europe. Our key markets are Finland, The Netherlands, Belgium and Central & Eastern Europe.

Nelonen Media
Sanoma Media Finland LTD
P.O. Box 95 00089
SANOMA

T: + 358 9 45 451
firstname.lastname@nelonenmedia.fi

www.nelonenmedia.fi/en

Anne Nokelainen
Vice President, Content Acquisitions
anne.nokelainen@nelonenmedia.fi
T: +358 40 7708412

Tiina Karo
Senior Acquisitions Executive
tiina.karo@nelonenmedia.fi
T: +358 9 4545 610

Tiina Holsti
Acquisitions Executive
Tiina.holsti@nelonenmedia.fi
T: +358 40 5564277

FINLAND



THE FINNISH BROADCASTING COMPANY (YLE)

Yle is Finland's national public service broadcasting company. Yle operates four national television channels (YLE TV1, YLE TV2, YLE Teema, Yle Fem) and six radio channels and services complemented by 25 regional radio programmes. Yle also offers online television and radio supply Yle Areena

YLE Centre
Radiokatu 5
Helsinki 00024
Yleisradio

T: +358 9 14801

www.yle.fi

Tarmo Kivikallio
Head of International Acquisitions
tarmo.kivikallio@yle.fi

Jarmo Lampela
Head of Drama
jarmo.lampela@yle.fi

Olli Tola
Commissioning Editor, series
olli.tola@yle.fi

Erkki Astala
Commissioning Editor, films and miniseries
erkki.astala@yle.fi

Liselott Forsman
Executive Producer, international projects
liselott.forsman@yle.fi

FINLAND

FRANCE

SOURCES: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission. CNC annual report (2013)

In the French market, TF1 remains the most popular channel with a daily audience share of 22.7% in 2012 but that share has been steadily falling (32% in 2005). The two public channels France 2 (14.9%) and France 3 (9.7%) stabilised their audience market share in 2012. Both in 2012 and 2011, the daily audience market share (11.2%) of the private channel M6 was even higher than that of France 3. TMC has confirmed its position as the fifth most-watched channel (3.6%), ahead of France 5 (3.5%). By March 2012 more than 97% of French television homes were digital. (Audience data source: Eurodata TV Worldwide / Médiamétrie / Médiamat).

The French audiovisual landscape is likely to experience a new major development with the expected arrival in September 2014 of Netflix, which will probably be a major competitor for Canal+. In January 2014, the Presidents of the three main private groups, TF1, M6 and Canal+, wrote a joint letter to the Minister of Culture requesting the urgent reform of audiovisual policy. One of the key issues of the debate is the revision of the release windows for film distribution.

Fiction is the first genre on the national free channels (TF1, France 2, France 3, France 5, M6, Arte, D8, W9, TMC, NT1, NRJ12, France 4, D17 and Gulli), representing 23% of the offer (28 100 hours) in 2013.

Historical national channels (TF1, France 2, France 3, Canal+, M6 and Arte) remain the major financers for French fictions. In 2013, they offered 851 nights (38,9%) of fiction among which a greater part of drama series (+41 nights) while one-off fictions works lost 12 nights. For the first time in 5 years, American fiction is decreasing (-15 nights compared to 2012) while European fiction works (beside french programs) is in constant growth (+22 nights).



The Rebound 2 (Les revenants, saison 2)
which receive MEDIA TV Programming
support in 2014.



ARTE FRANCE

ARTE is the French-German public television channel. Founded in 1991, it was given the mission of providing cultural programming that promotes unity and understanding among European nations. The channel is non-commercial and broadcasts without advertising. Financial support is provided through a television and radio licence fee in both countries. The channel is pioneering the marriage of television, internet and mobile networks as it continues to inspire viewers to think, explore and discover. ARTE FRANCE is the French partner in ARTE, providing 50% of the programming.

8, rue Marceau,
92785 Issy-les-Moulineaux
Cedex 9
France

T: +33 (0)1 5500 7777
+33 (0)3 8814 2222
F: +33 (0)1 5500 7700
+33 (0)3 8814 2200
artepro@arteFrance.fr
communication@arte-tv.com

www.arte-tv.com
Editorial line :
[http://download.pro.arte.tv/uploads/
Lignes-éditoriales-ARTE-2015.pdf](http://download.pro.arte.tv/uploads/Lignes-éditoriales-ARTE-2015.pdf)

Olivier Wotling
Fiction Director
o-wotling@arteFrance.fr

FRANCE



ARTE GEIE

AARTE GEIE is a public television broadcaster. The ARTE Group is composed of three entities: the headquarters in Strasbourg (ARTE GEIE) and two Members responsible for programme production and delivery, which are ARTE France in Paris (ARTE FRANCE (S.E.P.T.)) and ARTE Deutschland TV GmbH in Baden-Baden (ARTE DEUTSCHLAND TV GMBH).

Service Téléspectateurs
4, Quai du Chanoine Winterer
CS 20035
F- 67080 Strasbourg Cedex
France

T: +33 3.88.14.22.22
F: + 33 3.88.14.22.00

www.arte.tv

Sylvie Corso
Multi-lingual Productions,
Responsible for Acquisitions
s-corso@arte-tv.com

Lisa Muller
**In Charge of Fiction Programming,
Film and Fiction Department.**
l-mueller@arte-tv.com

Andreas Schreitmuller
Responsible for Fiction and Film
a-schreitmuller@arte-tv.com

FRANCE



CANAL J

Canal J is a Children's (4–14) entertainment channel. Magazines, fiction, cartoons, etc.

78, rue de Serres
Paris Cedex

T: +33 (0)1 5.3. 5555
F: +33 (0)1 5.3. 5559
tachaine@canalj.fr

www.canalj.fr
www.canalj.net

Emmanuelle Baril
Director of acquisition
emmanuelle.baril@canalj.fr

Caroline Mestik
Directrice des programmes
Caroline.mestik@canalj.fr

FRANCE

CANAL +

As a long-established partner to the French film industry, c+ screens up to 500 feature films per year, and covers the big events in the filmmaking calendar, in particular the Cannes Festival and the César and Academy Awards ceremonies. C+ offers its subscribers popular sports competitions (top domestic division, champions League. . .) To complement its bouquet of films and sports, c+ pursues an ambitious production policy under the banner CRÉATION ORIGINALE ("Original Programming"), driven by first-run TV drama and miniseries, hallmarked by daring and innovative screenwriting: SPIRAL, THE RETURNED, SPOTLESS, BRAQUO, LE BUREAU DES LÉGENDES and VERSAILLES. C+ brings viewers a range of international TV shows, featuring some of the most innovative and popular series at a global level, including HOUSE OF CARDS, HOMELAND, GOMORRA, THE AMERICANS and THE AFFAIR.

Canal Plus
1, place du spectacle
92130 Issy-les-Moulineaux
France

T: +33 1.71.35.35.35
F: +33 1.44.25.19.58

www.canalplus.fr
www.canal-plus.com

Aline Marrache
**VP Acquisitions Dpt - International
Fictions at Canal+ France**
aline-marrache@canal-plus.com

Myriam Esnouf
**Head of VOD & SVOD Movies & Series
Acquisitions / France & Canada**
myriam.esnouf@canal-plus.com

FRANCE



D8 / D17

Generalist channel broadcast on the digital terrestrial network. 100% owned by Canal+ Group.

Direct 8
1 place du Spectacle
92130 Issy-les-Moulineaux
France

T: 01.71.35.35.35

www.d8.tv

Valerie Billaut
Directrice de la Programmation
valerie.billaut@canal-plus.com

FRANCE



FRANCE 2

French national public service channel.

7, Esplanade Henri-de-France
75907 Paris cedex 15
France

T: +33 1.56.22.42.42
F: +33 1.56.22.56.32

www.france2.fr
www.francetelevisions.fr
pluzzvad.francetv.fr (VOD)

Thierry Sorel
**Directeur de l'unité de programme
fiction**
Thierry.sorel@francetv.fr

Frédéric Prallet-Dujols
**Directeur Adjoint des Acquisitions de
Programmes**
frederic.pralletdujols@francetv.fr

Catherine Wojtyczka
**Directrice Adjointe Negociation
Acquisitions Programmes**
catherine.wojtyczka@francetv.fr

Mederic Albouy
Head of Co-productions
mederic.albouy@francetv.fr

Tania Khali
Head of Acquisitions
tania.khali@francetv.fr



FRANCE



FRANCE 3

National public service broadcaster with 13 regional units. The regions produce and co-produce both regional and national programmes.

7, esplanade Henri de France
75907 Paris Cedex 15
France

T: +33 1.56.22.30.30
F: +33 1.56.22.73.39

www.france3.fr
www.francetelevisions.fr
pluzzvad.francetv.fr (VOD)

Francesca Dandolo
**Programming's Adviser At The
Cinema And Forein Fiction Unit**
dandolo@exchange.france3.fr

Anne Holmes
Head of fiction
anne.holmes@francetv.fr

Tania Khali
Head of Acquisitions
tania.khali@francetv.fr

FRANCE 4

France 4 is part of France Télévisions, the French public national television broadcaster. Previously named "Festival" (till 2005), and specialising in theatre, opera and French-language, and other European-originated drama, France 4 is now a channel for young adults. The channel has been recently re-positioned, with children being the target audience for daytime (6.30 a.m. to 6.30 p.m.), while the evening programmes should reach young people born after 2000 and young adults. France 4 also hosts a platform for creative web content : Studio 4.o. www.france4.fr/studio-4-o/).

7, esplanade Henri de France
75907 Paris Cedex 15
France

T: +33 (0) 1 40 62 65 50
info@france4.fr

www.france4.tv
www.francetelevisions.fr
pluzzvad.francetv.fr (VOD)

Tiphaine de Raguenel
**Directrice de l'Antenne et des
Programmes; Directrice des Activités
Jeunesse**
Tiphaine.deraguenel@francetv.com

Tania Khali
Head of Acquisitions
tania.khali@francetv.fr



LAGARDÈRE ACTIVE (CANAL J, GULLI, FILLE TV, TIJI)

Entertainment channel targeting female young adults (20 to 30 years old). Programming is composed mainly with TV fictions and magazines. The channel replaced Filles TV in October 2009, which was launched in 2004, targeting 11 to 17 year old girls.

JUNE (Ex-Filles TV)
78, rue Olivier de Serres.
Paris Cedex 15 75739
France

T: +33 (0) 156 36 55 27
news.june@lagardere-active.com

www.june.fr

Julia Tenret
Director of Acquisition (Fiction)
Julia.tenret@lagardere-active.com



LAGARDÈRE ACTIVE (CANAL J, GULLI, FILLE TV, TIJI)

Entertainment channel targeting female young adults (20 to 30 years old). Programming is composed mainly with TV fictions and magazines. The channel replaced Filles TV in October 2009, which was launched in 2004, targeting 11 to 17 year old girls.

JUNE (Ex-Filles TV)
78, rue Olivier de Serres.
Paris Cedex 15 75739
France

T: +33 (0) 156 36 55 27
news.june@lagardere-active.com

www.june.fr

Julia Tenret
Director of Acquisition (Fiction)
Julia.tenret@lagardere-active.com



M6

Second free-to-air commercial generalist channel in France. 48,6% owned by RTL Group.

M6
89, avenue Charles de Gaulle.
Neuilly sur Seine 92575
France

www.m6.fr

Bertrand Majani
Director of Acquisition
bmajani@m6.fr

Abigall Joliot
Acquisition – Cinema
ajoliot@m6.fr

FRANCE



13 ÈME RUE/SYFY (NBC UNIVERSAL GLOBAL NETWORK)

French cable and satellite channel.

44 rue Washington
Batiement Monceau
75408 Paris Cedex 08
France

T: +33 1 70 60 79 00
F: +33 1 70 60 79 02

www.13emerue.fr

Philippe Danon
Series & Documentaries
Programming Manager, acquisition
courts-métrages
philippe.danon@nbcuni.com

Kevin Deysson
Production & Acquisitions Executive
kevin.deysson@nbcuni.com

FRANCE



RTL9 (FRANCE)

RTL9 is broadcast via cable and satellite in France, and has also long been broadcast on the analogue terrestrial network in Lorraine (French region located near the Grand Duchy of Luxembourg) and in the Grand Duchy of Luxembourg (but analogue transmissions were shut down in July 2010). RTL9 is jointly owned by Groupe AB and by CLT-UFA.

45 boulevard Pierre Frieden
Kirchberg
Luxembourg

T: +352 42 142 7831 / 7850
F: +352 42 142 7839

www.rtl9.com



SÉRIE CLUB

Série Club and TF6 (50%-owned), target audiences looking for entertainment and series.

120 Avenue Charles de Gaulle
92522 Neuilly sur Seine
France

serieclub@serieclub.fr
serieclub.m6.fr

Florent Gellie
Responsable des acquisitions
fgellie@tf6.fr

FRANCE



TF1

TF1 is a national French TV channel, controlled by TF1 Group, whose major share-holder is Bouygues. TF1's average market share of 24% makes it the most popular domestic network. Flagship shows include Star Academy (Endemol's international competitor to the X Factor franchise), CSI and House, M.D. TF1 originally stood for Télévision Française 1 (French Television 1). Since its privatisation in 1987, the abbreviation is no longer expanded, so as to avoid confusion with the Entertainment channel targeting young adults. Jointly owned by the two main French commercial broadcasters (TF1 and M6).

1 quai du Point du Jour,
Boulogne Billancourt,
Cedex 92656
France

T: +33 (0)1 4141 1234
F: +33 (0)1 4141 2910 / 2840
comfi@tf1.fr

www.tf1.fr

Fabrice Bailly
**Directeur G.n.rale Adjoint de
l'Antenne en charge des Programmes
et des Acquisitions**
fbailly@tf1.fr

Nathalie Biancolli
Head of Acquisitions Management
nbiancolli@tf1.fr

Sophie Leveaux
Arstistique Director of acquisition
sleveaux@tf1.fr

Marie-Claire Sarry
Rights negotiation – acquisition
msarry@tf1.fr

FRANCE



TF1 INTERNATIONAL

Created in 1995, TF1 International is the worldwide distribution and acquisition arm of the TF1 Group, one of the leading media groups in France.

6, place Abel Gance
92100 Boulogne-Billancourt
France

T: +33 1.41.41.12.34
F: +33 1.41.41.21.33

www.tf1international.com

Sabine Chemaly
**Directeur/Responsable des ventes et
acquisitions, Exportateur**
schemaly@tf1.fr

Romain Brémond
Producteur délégué, Acquisitions
rbremond@tf1.fr

Thierry Decurcelle
Acquisitions
tdecourcelle@tf1.fr

FRANCE



TV5

Number 1 French-language channel worldwide, reaching 120 million homes across the 5 continents.

131, avenue de Wagram
Paris Cedex 17 75805
France

T: +33 1.44.18.55.55
F: +33 1.44.18.55.10

www.tv5.org

Marjorie Vella
In charge of acquisition - cinema
marjorie.vella@tv5.org

Christophe Assezat
In charge of acquisition - fiction and documentary
christophe.assezat@tv5.org

FRANCE



GERMANY

The television market in Germany is one of the largest in Europe and is also very competitive. In 2014, of the country's more than 38 million TV households an equal number (46%) received programmes by cable and satellite, 10% via DTT and about 5% via IPTV. As of 2014, nearly 84% of households have access to digital television.

In 2014 the two national public service channels (ARD and ZDF) have had a combined market share of 25,8% (compared to 24,9% in 2012). With a share of 13,3%, ZDF solidified its position ahead of ARD (12,5%) and RTL (10,3%) on the scale of popularity.

Cable and satellite distribution remain the most commonly used delivery platforms. Since 2009, the cable digitisation rate has doubled, stopping at about 63%, compared to 30,9%

Public broadcasters ZDF and ARD have decided to end a joint project aimed at creating a shared video-on-demand platform. As such, Germany's Gold will not be launched because the federal cartel office, Bundeskartellamt, has turned down the applications for failing to comply with anti-trust law.

Due in part to the broadcasting system being publicly funded, pay-TV does not have a long tradition in comparison to other countries. The acquisition of Germany's pay-TV operator Premiere AG by News Corporation (News Corp) in June 2008 and subsequent rebranding as Sky Deutschland Fernsehen GmbH & Co. KG was a step towards a more prominent position within the German market. As of 2014, the Sky Deutschland has gathered over 4,3 subscribers (in Germany and Austria).



Falciani's Tax Bomb, 2014 – Production Company: gebrueder beetz filmproduktion (supported by the Creative Europe MEDIA TV Programming scheme, 120.000 Euro)



Raven, the Little Rascal – The Series, 2015 – Production Company: Akkord Film Produktion GmbH (supported by the Creative Europe MEDIA TV Programming scheme, 500.000 Euro)



ARD – DAS ERSTE / DEGETO

ARD (full name: Arbeitsgemeinschaft der öffentlich-rechtlichen Rundfunkanstalten der Bundesrepublik Deutschland – Consortium of public broadcasters in Germany) is a joint organization of Germany's regional public-service broadcasters. Together with ZDF, ARD is running the children's programme channel K.I.K.A., an „event“ / current affairs and documentary channel PHOENIX and together with the French TV production house ARTE France, the European cultural programme ARTE. 3sat is jointly run by ZDF, SRG, SSR idée suisse and ARD. Within the programme ARD Digital, ARD broadcasts the additional programmes EinsExtra, EinsPlus and EinsFestival.

ARD DEGETO
Am Steinernen Stock 1
D-60320 Frankfurt am Main

degeto@degeto.de
+49-69-15 09 349

www.DasErste.de

Rainer Flaskamp
Commissioning Editor
rainer.flaskamp@degeto.de
0049 69 1509 382

GERMANY



ZDF – ZWEITES DEUTSCHES FERNSEHEN

Zweites Deutsches Fernsehen (English: “ZDF German Television”), ZDF, is a public service German television broadcaster based in Mainz (Rhineland-Palatinate). It is run as an independent non-profit institution, which was founded by all federal states of Germany (Bundesländer). ZDF is financed by television licence fees and advertising revenues. ZDF is a partner in the channels Arte and 3sat and it runs the digital channel ZDFneo (among others), all the mentioned channels schedule TV drama.

ZDF-Strasse 1
D – 55100 Mainz

ZDF Enterprises GmbH
Erich-Dombrowski-Str. 1
D–55127 Mainz

Spielfilm-Leitung@zdf.de
www.zdf.de

Ms Susanne Mueller
Executive Director Feature Films
Commissioning Editor International
Series
+49 6131 701 2451
Mueller.s@zdf.de

Tasja Abel
Development and Coproduction
Representative ZDF Enterprises
tasja.abel@gmail.com
0049 172 140 1760

GERMANY



BR – BAYERISCHER RUNDFUNK

Bayerischer Rundfunk is Bavaria's public broadcasting service with two television stations (BR and BR Alpha) belonging to the ARD network of regional public broadcasters. As part of the ARD public network BR has acquired a reputation for feature films and high-quality documentaries and delivers programming that provides information, gives advice and entertains, and also accommodates the interests of minority groups.

Bayerisches Fernsehen
Sportredaktion
Floriansmühlstraße 60
80939 München

T: 0049/89/59 00-01

www.br.de

Hubert von Spreti
Executive commissioning editor
hubert.vonspreti@br.de

Bettina Ricklefs
Head of film and series department
bettina.ricklefs@brnet.de

GERMANY



HR – HESSISCHER RUNDFUNK

The HR is a public broadcaster based in Frankfurt. Belonging to the ARD-consortium of public broadcasting stations, the hr contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes.

Anstalt des öffentlichen Rechts
Bertramstr. 8
60320 Frankfurt

069 / 155-1

www.hr-online.de

Liane Jessen
**Executive area television play and
feature films**
Liane.Jessen@hr.de
0049 69 / 155-2357

Jörg Himstedt
Commissioning Editor
Joerg.Himstedt@hr.de
+49 69 1552552

GERMANY



KIKA

Childrens television channel operated jointly by ARD network and ZDF, series, feature films, magazines, documentaries, news and current affairs programs, specialties and programming days dedicated to topical issues, in-house productions, live broadcasts, numerous first broadcasts, as well as classics of children's programs produced by ARD and ZDF. Offering a large variety of high-quality, target-group-oriented programs free from commercials, for children aged three to thirteen.

Der Kinderkanal von ARD und ZDF
Gothaer Straße 36
99094 Erfurt

www.kika.de

Sebastian Debertin
**Head of Fiction, Acquisition & Co-
production**
sebastian.debertin@kika.de
0361/2181869

Stefan Pfäffle
**Deputy Head of Fiction, Acquisition
& Co-production**
stefan.pfaeffle@kika.de
0361/2181742

GERMANY



MDR - MITTELDEUTSCHER RUNDFUNK

The MDR is a public, terrestrial broadcaster based in Leipzig. Belonging to the ARD-consortium of public broadcasting stations, the rbb contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes for Saxony, Saxony-Anhalt and Thuringa.

Kantstr. 71-73
04275 Leipzig

www.mdr.de

Martina Faust
MDR Film Aquisitions
0049 341 300 7815.

Jana Brandt
Head of Films
jana.brandt@mdr.de
+49 341 30 0 7815

GERMANY



NDR – NORDDEUTSCHER RUNDFUNK

NDR Fernsehen – Information and Entertainment from the North. Regional full programme with a clear Northern German emphasis. Belonging to the ARD-consortium of public broadcasting stations.

Hugh-Greene-Weg 1
22529 Hamburg

T: 0049/40/41 56-0
F: 0049/40/44 76 02
ndr@ndr.de

www.ndr.de/home/index.html

Christian Granderath
Head of Film and Series
c.granderath@ndr.de
+49-221- 9258 230

Karen Matthiesen
CE TV movie and feature film
k.matthiesen@ndr.de
+49 40 4156 5793

GERMANY

PROSIEBEN/SAT.1 TV DEUTSCHLAND GMBH

ProSiebenSat.1 TV Deutschland GmbH combines commercial TV stations SAT.1, ProSieben, kabel eins, sixx, SAT.1 Gold, and ProSieben MAXX. The broadcasting family offers strong broadcast brands with recognition value, clear profiles, and a colorful mix of popular, familiar and big, innovative. ProSiebenSat.1 TV Deutschland is part of the ProSiebenSat.1 Group, one of Europe's leading media groups.

ProSieben Television GmbH & SAT.1
Satelliten Fernsehen GmbH
Medienallee 7
85774 Unterföhring

www.ProSiebenSat1.com

Rüdiger Böss
**Senior VP Group Programming
Acquisitions**
ruediger.boess@prosiebensat1.com
+49(0)89-9507-1226

Angeli Agethen
**Senior Manager Group Programming
Acquisitions**
angeli.agethen@prosiebensat1.com
+49(0)89-9507-1235

Michael Miesbach
**Senior Manager Group Programming
Acquisitions Commissioning Editor**
michael.miesbach@prosiebensat1.com
+49(0)89-9507-1225

Sigrid Egger
**Senior Manager Group Programming
Acquisitions Commissioning Editor**
sigrid.egger@prosiebensat1.com
+49(0)89-9507-1236

Jochen Ketschau
**Senior VP German Fiction &
Coproduction**
Jochen.Ketschau@prosiebensat1.com
+49-89-95072351

Koby Gal-Raday
**Senior Vice President International
Co-Production & Documentaries**

Patrick N. Simon
Commissioning Editor Fiction
Patrick.Simon@prosiebensat1.com
+49-89-95072353

GERMANY



RBB - RUNDFUNK BERLIN-BRANDENBURG

The rbb is a public, terrestrial broadcaster based in Berlin and Potsdam. Belonging to the ARD-consortium of public broadcasting stations, the rbb contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes. The rbb Drama Department commissions tv-movies as well as series, serials, debuts and feature films.

located in Berlin:
Masurenallee 8-14,
14057 Berlin

located in Babelsberg:
Marlene Dietrich-Allee 20, 14482 Potsdam

www.rbb-online.de

Cooky Ziesche

**Commissioning Editor – Head of
Film/Cinema/Coproduction and
University Projects**

Cooky.ziesche@rbb-online.de

+49.30.979 93 24 100

GERMANY



RTL TELEVISION GMBH

RTL Television is Germany's leading private broadcaster among viewers (14 to 59 years) and the general public alike. RTL features a strong line-up with highlights in all genres including big entertainment, factual entertainment formats, popular US series, the most popular German daily soap "Gute Zeiten, schlechte Zeiten" (Good Times, Bad Times), fiction formats like the action series "Alarm für Cobra 11" or "Deutschland 83", comedy shows, news programmes like "RTL Aktuell" and live sporting events such as the Formula 1. RTL Television is part of the The Media Group RTL Germany (RTL, RTL 2, VOX, SuperRTL, n-tv, RTL Nitro), one of the leading media companies in Germany.

Picassoplatz 1
D-50679 Köln

www.rtl-television.de
www.rtl.de

Philipp Steffens
Head of Fiction
philipp.steffens@rtl.de
0049 221 456 72200

Tom Beyer
Executive Acquisitions Manager
Feature Films
tom.beyer@mediengruppe-rtl.de
+49 221-456-72501

GERMANY



SAARLÄNDISCHER RUNDFUNK

Saarländischer Rundfunk (Saarland Broadcasting - SR) is a public radio and television broadcaster for the German Bundesland (State) of Saarland, with its headquarters in the Broadcasting House Halberg in Saarbrücken. SR is a member of the ARD consortium.

Funkhaus Halberg
66100 Saarbrücken

T: 0049/681/6 02-0
F: 0049/681/6 02-38 74
info@sr-online.de

www.sr-online.de

Lutz Semmelrogge
Head of Programm

GERMANY



SKY DEUTSCHLAND FERNSEHEN GMBH & CO. KG

Sky Deutschland is the leading provider of Pay-Tv in Germany and Austria. The company offers subscription-based TV as well as on-demand services to private and business customers. With over 70 exclusive TV channels the SKY platform offers live sport, feature films, series, children programs and documentaries. Sky Deutschland has recently engaged in production and co-produced of fiction.

Medienallee 26
85774 Unterföhring

+49 89 995802
+49 89 99586239
info@sky.de

www.sky.de

Marcus Ammon
**Senior Vice President of Fiction
Programming**
marcus.ammon@sky.de

Frank Jastfelder
Head of Drama Production
frank.jastfelder@sky.de

Gary Davey
**Executive Vice President
Programming**
gary.davey@sky.de

GERMANY



SWR SÜDWESTDEUTSCHER RUNDFUNK

SWR is a regional public broadcasting station with two television channels serving the southwest of Germany. The corporation has main offices in three cities: Stuttgart, Baden-Baden and Mainz. It is the second largest broadcasting organization within the ARD network of public broadcasters. Its programming provides information, education, guidance and entertainment within a special focus on culture.

Funkhaus Stuttgart
Neckarstraße 230
70190 Stuttgart

T: 0711/ 929-0
F: 0711/ 929-12600
info@swr.de

www.swr.de

Stefanie von Ehrenstein
Head of Family Programmes
stefanie.von_ehrenstein@swr.de

Martina Zöllner
Head of Film and Culture

GERMANY



TELE 5

TELE 5 is a national Free-TV channel that addresses all viewers with a broad fictional programming of feature films, series and docu-fiction. As a subsidiary of the Tele Munich Group (TMG), TELE 5 has access to their programme catalogue with German - speaking TV rights to more than 5000 feature films, TV movies and mini-series. Additional acquisitions from major studios and independent distributors complement the versatile movie- and series programme.

Bavariafilmplatz 7
82031 Grünwald

www.tele5.de

Thomas Friedl
Director of Programming
thomas.friedl@tele5.de

Renate Müller
**Programming department feature
films**
Renate.mueller@tele5.de
+49 89/64 9568-207

GERMANY



VOX TELEVISION

VOX belongs to the RTL-network and doesn't broadcast its own motion picture productions. RTL is also the purchaser for VOX motion picture.

Picasso-Platz 1
50679 Köln

www.vox.de

Sophia Dauber
Senior Acquisition Manager
sophia.dauber@mediengruppe-rtl.de
0049 221 456 72514

Patricia Marras
Editor International Fiction
patricia.marras@mediengruppe-rtl.de
0049 221 456 72533

GERMANY



WDR – WESTDEUTSCHER RUNDFUNK

The WDR is a public broadcaster based in Cologne. Belonging to the ARD-consortium of public broadcasting stations, the WDR contributes to the output of the national tv-channel “Das Erste” and also produces regional television programmes. The WDR Drama Department commissions tv-movies as well as series, serials, debuts and feature films.

Appellhofplatz 1
50667 Köln

www.wdr.de

Dr. Götz Schmedes
Commissioning Editor
goetz.schmedes@wdr.de
0049 (0)221 - 220 42565

GERMANY



GREECE

Two were the major events at the Greek audiovisual sector during the latter period. A new act on public broadcasting was passed by the Greek Parliament, materialising a major pre-electoral promise of the new left-wing government for the reopening the ERT SA which had been shut down on 11 June 2013. The Hellenic Parliament aiming to ensure the uninterrupted provision of public service broadcasting, approved and voted for the re-opening of ERT S.A. and as a result of that decision on June 2015, ERT started broadcasting again. The renewed ERT broadcasts four digital TV channels (ERT1, ERT2, ERT3 and ERTHD which broadcast ERT1 program in High Definition) and seven different radio programs (Proto Programma, Deutero Programma, Trito Programma, Filia, ERA Sport, KOSMOS and the world-wide program Voice of Greece). The second development is a proposal for a new bill on licensing of television stations which seeks to regulate the licensing procedure for broadcasters, ensuring pluralism, the objective information, the development of healthy competition, simplification of the licensing process and generally provide quality television services.



HELLENIC PARLIAMENT TV

The Television Station of the Hellenic Parliament is operating since 1999 as an autonomous television network, a non-profit mass medium. It broadcasts a daily parliamentary newscast that gives briefings on the day-to-day business of parliament, as well as information on democratic institutions and the parliamentary history of Greece. Moreover, in the framework of promoting cultural subjects, the Television of the Parliament broadcasts classical movies, historical and scientific documentaries, opera, theatrical plays and ballets, while emphasis is given to folklore subjects designating the social history of the different areas of our country.

Amalias Av. 14
Athens 105 57
Greece

T: +30 210 3735320

www.parliament.gr/Enimerosi/Vouli-Tileorasi/Contact

Aris Fatouros
Director of Program
arisfatouros@parliament.gr

Panos Kouanis
Head of Acquisition
kouanis@parliament.gr

GREECE



ALPHA SATELLITE TELEVISION SA

Alpha is a family-oriented station. It features popular fiction, light entertainment, live programming as well as news and informative shows. It reaches its audience through various consumer touch points and platforms: free-to-air, online and mobile, engaging its viewers in multiple ways. It also has its own studios for in-house productions and its programs are transmitted to Australia (UBI), the US (Dish).

Alpha Pallini Site
Thesi Petsa Vakalopoulou
BIOPA Pallinis
Pallini 15351
Greece

Fax: +30 212 212 4356 & +30 212 212 4697

Kostas Sousoulas
General Director Of Television
k.sousoulas@alphatv.gr

George Pofantis
Director of Programming
g.pofantis@alphatv.gr

Maria Makri
Foreign Program Manager
m.makri@alphatv.gr

Dimitra Kostopoulou
Head of Greek Fiction
d.kostopoulou@alphatv.gr

Maria Sagana
Head of Entertainment
m.sagana@alphatv.gr

GREECE



MEGA CHANNEL

Mega Channel was the first TV station to be established in Greece (1989) on the basis of the legal framework that permitted the formation of private television stations. During its years of operation, has attained a high position in the public's preference. Mega's programming consists mainly of Greek programs such as comedies, dramas, news, current affairs and entertainment shows.

Roussou 4 & Mesogion
11526, Athens
Greece

T: +30 210 6903000
F: +30 210 6983600

www.megatv.com

Loizos Xenopoulos
Director of Program
loizos.xenopoulos@megatv.com



SKAI TV

Skai TV is a television network part of the Skai Group. It was relaunched in its present form on 1 April 2006 in Athens metropolitan area, and gradually spread its coverage nationwide. Besides analogue terrestrial transmission, it is available on the subscription-based encrypted services of Nova and OTE TV. Skai TV is also a member of Digea, a consortium of private television networks introducing digital terrestrial transmission in Greece. Skai TV airs a diverse programming mix with a focus on entertainment and information.

Ethnarhou Makariou & Falireos 2
18 547 N. Faliro
Greece

T: +30 210 4800000
F: +30 210 4800041

www.skai.gr/tv/

Alkisti Maragoudaki
Director of Program
amaragoudaki@skai.gr

GREECE



MAD TV

Mad TV is one of the most recognizable music channels in Greece part of the largest organization of Mad Music & Media Services which manages and operates on a daily basis four television channels (Mad Greekz / Nova, Mad Cyprus / Cyprus, Mad Al / Albania, Mad lits / OTE TV), one radio station (106.2 Mad Radio) and one internet site.

Ethnikis Antistaseos 253 & Kapodistriou
15351 Pallini
Greece

T: +30-210-6665669
F: +30-210-6665812

<http://mad.tv/mad-tv-greece/>

Konstantinos Bourounis
Head of Programming
k.bourounis@mad.gr

GREECE



NOVA TV

Nova TV is the first digital, satellite TV platform in Greece activated in the field of pay TV. Part of Forthnet Group which is the largest privately owned group that provides broadband and pay TV services in Greece. Forthnet Group is constantly devoted to the development of pioneering proposals for the provision of integrated and inexpensive communication and entertainment services to the Greek family.

Proektasi Manis str.
15351 Pallini Kantza
Greece

T: +30 210 6602000
F: +30 210 6658824

www.nova.gr

Agapi Kefaloyanni
Senior Program Manager
akefalog@forthnet.gr

GREECE



MTV GREECE

MTV Greece, began September 1, 2008 and is the Greek version of MTV. It broadcasts mainly foreign and Greek pop, rock, dance and hip hop music, shows of MTV international as: Pimp My Ride, Disaster Date, Made, Room Raiders, Death Valley and greek productions as: Movies & Stars, HitList Hellas, Everyday Girls, MTV News, Your Noise Daily, City Life, Game On and Live @ Your Place.

Apostolou Pavlou 4
151 23 Marousi Athens
Greece

T:+30 2106871000
F:+30 2106871001
programming@mtvgreece.tv

www.mtvgreece.gr



GREECE



ANT1

The business and communicative flagship of the Antenna Group, ANT1 channel was founded in 1989 and since then has been maintained a leading position. It is the first private television station broadcast the voice and image of Greece in USA, Australia and Europe. Programming consists of comedies, dramas, news, current affairs programs, game shows and entertainment shows. Over the years the ANT1 evolved into an innovative channel reflect the views of contemporary Greek and offers high quality information and entertainment aspect, immediacy and consistency.

10-12 Kifisias Ave.
15125 Marousi
Athens Greece

T:+30 210 6886100

<http://www.antenna.gr/tv/>

Nick Pawsey
Head of Group Acquisitions
pawsey@antenna.gr

Alex Theodori
Head of Acquisitions
theodoria@antenna.gr

Chrissa Masourou
Head of Programming
masourouc@antenna.gr

GREECE

STAR CHANNEL

Star Channel was founded in 1993 and has more than 100 privately owned broadcasting centers covering 95% of the population. It has gone in the minds of viewers as “the TV station with the best foreign films and series”, a fact which has been repeatedly awarded in various television awards. Generally, the program is aimed primarily at viewers aged 15-44 years. Its aim is to further strengthen its position in the television horizon, with equal emphasis on the information and the entertainment sector.

36 Viltanioti st.
14564 Kifisia Athens
Greece

T: +30 211 1891000, 211 1892000

www.star.gr

Nathalie Woodfield
Director of Program
nwoodfield@star.gr

Koralia Georgakopoulou
Head of Greek Programming
kgeorgakopoulou@star.gr

Gina Dimitriadi
Head of International Content
gdimitriadi@star.gr

Thaleia Psycha
Program Coordinator
tpsycha@star.gr

GREECE



ERT SA

Nerit is a public service broadcasting corporation. Financed by license fee and advertising, it has national coverage and is broadcasting in Greek. The tv channels are complementary and the programming offers news, current affairs, documentaries, art programs, drama, sports, entertainment and educational programs.

Mesogion 432,
Agia Paraskevi
Athens
Greece

T: +30 210 6066000

www.ert.gr

Directorate of Television Program

programtv@ert

+30 210 6092033-5

GREECE



OTE TV

OTE TV is a satellite and IPTV Pay TV service, being a business unit of the Hellenic Telecommunications Organization (OTE), the largest telecommunications provider in the Greek market. Among a portfolio of over 80 channels, OTE TV offers 3 OTE Cinema channels: OTE Cinema 1 HD, OTE Cinema 2 and OTE Cinema 3.

Kifisias Av. 99
151 24 Marousi
Athens Greece

T: +30 21 0611 1000

www.otetv.gr

Dimitris Michalakis
Business Unit Director

Alex Christoyiannis,
**Cinema & Thematic Channel Deputy
Director**
achristoyiannis@ote.gr
+30 2106115180

Greg Cokinakis,
**Cinema Channel & VOD Section
Manager**
gkokkinakis@ote.gr
+30 2106116113

GREECE



HUNGARY

The Hungarian market is dominated by the two private channels: RTL Klub (RTL Group) and TV2 (formerly ProsiebenSat1, sold in early 2014), who continue to have the biggest audience market shares. RTL Klub remained the market leader in 2012 with 17.9% (down from 26% in 2007) while TV2 had 15.8% (down from 23% in 2007). During primetime RTL Klub has a share of 29.3% while TV2 has a share of 20.8%. The public channels M1 and M2 had a combined market share in 2012 of 13.3% (an increase in share compared with 2011).

(Audience data source: Eurodata TV Worldwide / AGB Nielsen Media Research Hungary)

Data from the National Media and Communications Authority of Hungary claimed that almost 67% of Hungarian households received digital television in September 2013. Cable services are available in approximately 52% of households at the end of 2012. The sector includes a large number of local and regional cable operators (more than 400) and a few larger operators (UPC Hungary, Fibernet, and T-Kabel). Approximately 14% of cable households were digital at the end of 2012. UPC had 629 300 subscribers at the end of September 2013, of which 57% were digital cable homes. In September 2009 T-Kabel, which was formerly owned by subsidiary companies of Magyar Telekom was officially merged with Magyar Telekom, and the company serves almost 200 000 homes (September 2013).

The Hungarian market includes five satellite services reaching approximately 990 000 homes. These include UPC (UPC Direct) which had 261 600 subscribers in September 2013, T-Home with 304 667 and Digi TV the market leader with approximately 400 000 subscribers. In addition a new service, Hello HD was launched in May 2008 (with approximately 40 000 subscribers in 2013). Magyar Telekom launched the T-Home package in 2008, and launched its Interactive Sat TV platform in 2011, which includes a range of interactive services including an Internet connection. This allows access to the UPC Videothek, also available to IPTV customers.

Hungary switched off analogue terrestrial transmission in October 2013, earlier than expected. Antenna Hungária was granted both licences for the free and pay DTT platforms in 2008. The free-to-air platform (Mindig TV) was launched in December 2008 followed by the pay DTT platform Mindig Extra (formerly Terra+) in May 2010. In October 2013 Antenna Hungária claimed that more than 350 000 homes were linked to Mindig TV. The pay service had almost 120 000 subscribers. The platform offers twelve free (including three versions of Euronews and HD services of the public channels) and twenty-four pay channels. The addition of new channels was made possible by the use of Multiplex B. Having previously been allocated for DVB-H services, Multiplex B became free after the cancellation of these services.

SOURCE: MAVISE Database
— a database provided by
the European Audiovisual
Observatory on behalf of the
DG Communication of the
European Commission.



DUNA TELEVISION (DUNA / DUNA WORLD - MTVA)

Naphegy tér 8.
Budapest 1016

dunatv.hu

Dobos Menyhért

CEO

kantor.eszter@dunatv.hu

T: (+36 1) 441 9717

HUNGARY



MTVA - MEDIA SERVICE SUPPORT AND ASSET MANAGEMENT FUND

The Media Service Support and Asset Management Fund is the umbrella organization of the Hungarian public service media. Since its foundation in 2011, MTVA has unified and streamlined all content production and asset management activities for the entire Hungarian public service media, thus creating the largest media service organization in Hungary. Whilst producing content for television, radio, online platforms and news agencies, MTVA also manages all assets on behalf of the Hungarian public service broadcaster Duna Media Service Non-Profit Ltd. MTVA also provides support with content production and acquisition.

Kunigunda útja 64
Budapest 1037

info@mtva.hu
(+36 1) 759 5011

mtv.hu

Dr. László Zsolt Szabó
Director General
titkarsag@mtva.hu
(+36 1) 759 6203

Mr Viktor Nyomárkay
Head of International Relations
nyomarkay.viktor@mtva.hu
(+36 1) 759 5085

HUNGARY



RTL KLUB

The Hungarian RTL Television Company was founded on 8 April 1997, and the television channel RTL Klub run by the company was launched in October 1997. RTL Klub has been one of the largest and most influential participants of the Hungarian television market since 1999, and it has continuously preserved its position. In 2011 RTL Group increased its existing shareholding in M-RTL Zrt by 31% and thus the media conglomerate became the single 100% owner of the channel RTL Klub. Simultaneously the media group purchased seven cable channels: Cool, Film+, RTLII, Film+2, sorozat+, RTL+ and Music TV, which comprise the portfolio of RTL Hungary. The CEO of M-RTL Zrt has been Gabriella Vidus since 1 July 2015.

Nagytétényi út 29.
Budapest, 1222

rtl.hu

Rudas Andreas
CEO
rtlhirek@rtlklub.hu
(+36 1) 382 8282

HUNGARY



TV2 GROUP (MTM-SBS)

TV2 is one of the biggest commercial free TV channels in Hungary, reaching millions of viewers day by day. Owing to the extraordinary proportion of local production TV2 is unique and cannot be missed. The premium-quality basic cable channel of the portfolio is SuperTV2, where the audience can enjoy programmes produced specifically for this channel. FEM3 fascinates: provides good advice and tells stories on top of entertaining female spectators daily. PR04 is the male-oriented channel of TV2 Group: it offers sports content besides movies and series.

Róna u. 174.
H-1145 Budapest

tv2@tv2.hu

tv2.hu

Simon Zsolt
CEO
kozonsegszolgalat@tv2.hu
(+36 1) 467 6400

HUNGARY



TV2 GROUP (MTM-SBS)

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Róna u. 174.
H-1145 Budapest

tv2@tv2.hu

tv2.hu

Simon Zsolt
CEO
kozonsegszolgalat@tv2.hu
(+36 1) 467 6400

HUNGARY



ICELAND

The Icelandic TV market is dominated by three channels, which had a combined daily audience share of 94.6% in 2012: the public channel Sjónvarpið (RÚV-TV) had in 2012 a share of 56.3%, while the two major private channels, Stöð 2 (a pay-TV channel) and Skjár 1, had respectively shares of 29.1% and 9.1%. (Audience data source: Eurodata TV Worldwide / Capacent Iceland).

The Icelandic market has thirty channels, four of which broadcast nationally: the pay-TV channels Stöð 2 and Stöð 2 Sport and the free-to-air channels Sjónvarpið (public) and Skjár 1. They can be received by more than 90% of the population. Others, such as Althingi (the parliament channel), INN, N4, Omega, Stöð 2 Extra and the pay-TV channel Stöð 2 Bio reach between 50 and 90% of the population. In October 2013 Stöð 3, a new pay channel targeting the 20-35 age group, started broadcasting. After the launch of three new channels in August 2012 (Stöð 2 Krakkar, Stöð 2 Gull, Stöð 2 Popptívi) by 365 ljósvakamiðlar ehf., a subsidiary of Dagsbrún hf, the company's total number of channels has increased to eleven (others include Stöð 2, Stöð 2 Sport, Stöð 2 Bíó, Stöð 2 Extra and their time-shifted versions). Skjár 1 is controlled by Síminn hf., the former national telecommunications operator Landssími Íslands hf, which was privatised in 2005.

Dagsbrún and Síminn, who own the main private Icelandic channels, are also the most important players on the pay-TV distribution market. Dagsbrún controls the digital terrestrial television platform and the IPTV service launched by Vodafone in 2007. Síminn operates the IPTV platform Sjonvarp Simans, which was launched in 2004.

On 15 April 2011 the Icelandic Parliament adopted a new media act, to implement the Audiovisual Media Services Directive and replace the 2000 broadcasting act, and the 1956 press act. It introduces an obligation for all media in Iceland to be registered with a new media authority, the Media Committee. In November 2012 the Minister of Education, Science and Culture appointed a Committee to propose amendments to the media law, with a focus on media coverage of elections. On February 2013 the Committee, taking into consideration some comments suggested by the OCSE in 2009, issued a report proposing several amendments regarding mostly political advertisement on opinion polls on the elections. The report and proposals were presented to the Minister of Education, Science and Culture and the Parliament, but no amendments had been approved by end 2013.



Both of these images are from *The Cliff (Hamarinn)*, 2009. Production Company: Pegasus.



RIKISUTVARPID, RUV

Ríkisútvarpið, RÚV, The Icelandic National Broadcasting Service, is a public service broadcaster owned by the Icelandic state. RÚV is financed by state funding and revenues from advertisements. RÚV's income can only be allocated for broadcasting purposes. RÚV's television network reaches 99,9% of households; market share in viewing throughout 2010 was 51,7% for RÚV TV. According to the Broadcasting Act the main obligation of RÚV is to promote the Icelandic language and history as well as Iceland's cultural heritage.

Efstaleiti 1,
103 Reykjavík
Iceland.

T: (+354) 515 3000
F: (+354) 515 3010
istv@ruv.is

www.ruv.is

Gudrun Helga Jonasdóttir
Acquisition
gudrunhj@ruv.is
+354 515 3000

Skarphedinn Guðmundsson
Director of programming
skarpi@ruv.is



ITC SKJARINN

ITC Skjarinn is an independent media company which divides into four different media units. The cable service distributes over 60 foreign cable channels including DR1, Discovery, BBC World News and more. The VOD service offers the largest VOD service via IPTV in Iceland. Screen One is a pay TV channel financed by subscription fees and advertising revenue. Its main programming needs are scripted dramas and high quality entertainment content. Screen One also produces it's own local programming. Screen One also produces it's own local programming, both scripted

and entertainment.
Skiopholt 31,
105 Reykjavik,
Iceland.

T: +354 595 6000

www.skjarinn.is

Palmi Gudmundsson
Head of Programming
palmi@skjarinn.is

Berglind Osk Kjartansdottir
Assistant to Head of Programming
berglind@skjarinn.is

ICELAND

STÖÐ 2 (CHANNEL 2)

Stöð 2 (Channel 2) is an ad-supported subscription TV channel founded in 1986. On average 45% of Icelandic households subscribe to Stöð 2. Stöð 2 is a part of 365 Media, Iceland's leading media company. Stöð 2 offers a selection of the world's highest rated TV shows, award-winning series, latest Hollywood blockbuster features, the most popular local programming, scripted and non-scripted as well as daily local news and news related programming. As a brand Stöð 2 operates several other subscription channels including two sports channels and a movie channel.

Skaftahlid 24,
105 Reykjavík,
Iceland

T: +354 512 5000

www.stod2.is

Saevar Hreidarsson
**Director of programming and
acquisitions**
saevar@365.is

ICELAND



IRELAND

In Ireland the national public service broadcaster remains the strongest player in the TV market while British channels and companies continue to play an important role. The public service channels, RTÉ1 and RTÉ2, had a combined market share of 33.1% in 2010 (almost 5% less than in 2006). The private channel, TV3 (launched in 1998) had a 12.4% market share, and is now the second most popular channel. The other two national Irish broadcasters are the public service Irish language channel TG4, and the entertainment channel 3e (owned by TV3). The five most popular UK channels are ranked in the following order: BBC1, UTV, S4C, BBC2, and Sky 1 (with a combined share of 15.1% in 2010). With the launch of DTT services, the public service broadcaster has also launched additional digital channels (Audience data source: Eurodata TV / AGB Nielsen Media Research)

The introduction of DTT in Ireland was long delayed but is finally under way since the end of 2010. The Broadcasting Authority of Ireland announced in August 2010 that commercial DTT has been ruled out for the time being, but the tender for the Multiplexes may be re-launched in 2013 after switch-off. The multiplexes of the PSB RTÉ were launched in October 2010 as a trial, with the full service “Saorview” launched in May 2011. The total offer now includes the channels RTÉ 1, RTÉ 2, TV3, 3e, TG4, and RTÉ News Now. New services launched by the PSB are the following: RTÉjr (children) RTÉ One + 1, RTÉ Aertel Digital (teletext), and a trial HD service. Switch-off is planned for October 2012.

The Broadcasting Act of 2009 consolidated all previous broadcasting legislation. The Act also established the new broadcasting regulatory authority (the Broadcasting Authority of Ireland – BAI, which merged the Broadcasting Commission of Ireland (BCI) and Broadcasting Complaints Commission (BCC). The BAI was officially launched in October 2009 and now also has responsibility for the regulation of public service broadcasters in Ireland.

UTV Ireland, a new edition to the UK's UTV Media plc. Media company, commenced broadcasting in January 2015 from its base in Dublin. It is a general entertainment channel, offering national news and current affairs programming and acquired documentary, drama and film content. It is intended that a one-hour peak time news, current affairs and community programme will be delivered each evening initially and that as the channel grows, UTV Ireland will develop further indigenous Irish content.



Trivia, 2010 – Production Company: Grand Pictures. Developed with the support of the MEDIA Slate Funding scheme.



RTÉ

Raidió Teilifís Éireann, (*Radio [and] Television of Ireland*; abbreviated as RTÉ) is a semi-state organization and the public service broadcaster of Ireland. It both produces programmes and broadcasts them on television, radio and the internet. RTÉ operates two free-to-air television channels, RTÉ One and RTÉ Two. RTÉ One is the main channel providing a comprehensive range of home-produced Irish factual, entertainment, drama and lifestyle programming, which is complemented by selected acquired material. RTÉ Two is a mixed-genre channel appealing to a variety of audiences across the schedule. During daytime its primary focus is children and sports; in the evening it targets viewers of a young mindset with innovative drama, entertainment and key acquisitions.

Donnybrook
Dublin 4
Ireland

T: +353 1 208 3111
F: +353 1 208 3080
info@rte.ie

www.rte.ie

Jane Gogan
Commissioning Editor, Drama
drama@rte.ie

Dermot Horan
**Director of Broadcasting &
Acquisitions**
dermot.horan@rte.ie

IRELAND



TG4

TG4 (Irish: TG Ceathair or TG a Ceathair) is a public service broadcaster for Irish-language speakers. The channel has been on-air since October 31, 1996 in the Republic of Ireland and since April 2005 in Northern Ireland. The daily Irish language programme schedule is its core service: seven hours of programming in Irish supported by a wide range of material in other languages such as French and English.

Baile na hAbhann
Co. Galway
Ireland

T: +353 91 505050
F: +353 91 505021

www.tg4.ie

Mícheál Ó Meallaigh
Senior Commissioning Editor
micheal.o.meallaigh@tg4.ie

Proinsias Ní Ghráinne
Commissioning Editor
proinsias.ni.ghrainne@tg4.ie

Lís Ní Dhálaigh
Acquisitions & Output Director
lis.ni.dhalaigh@tg4.ie

Deirbhile Ní Churraighín
Acquisitions Executive
deirbhile.ni.churraighin@tg4.ie

Máire Ní Chonláin
Commissioning Editor
maire.ni.chonlain@tg4.ie

IRELAND



TV3

TV3 is a commercial free-to-air television broadcaster in the Republic of Ireland and Northern Ireland which launched on September 20, 1998. It was the country's first independent commercial broadcaster. TV3 is operated by the TV3 Group which also consists of television channel 3e and the online service tv3.ie

Westgate Business Park
Ballymount
Dublin 24

T: +353 1 4193333
info@tv3.ie

Lynda McQuaid
Director of Content
lynda.mcquaid@tv3.ie

IRELAND



UTV IRELAND

UTV Ireland is Ireland's newest television channel, providing the best in family entertainment, news and current affairs. UTV Ireland Limited is owned and operated by UTV Media plc. The channel was launched on January 1st 2015.

UTV Ireland Limited
Macken House
Mayor Street Upper
Dublin 1

01-8509800

www.utv.ie

Mary Curtis
Head of Channel
Mary.curtis@utv.ie

Commissioning Department
commissioning@utv.ie

IRELAND



ITALY

Apart from the continuous trend of audience shares decrease, the Italian market is still highly concentrated between the two main operators: the public service broadcaster RAI and the private group Mediaset, which hold together 87.2% of the market share of free to air television, which represents a unique situation in Europe. A third pole, even if much smaller, could be represented by the two channels La7 and La7D, previously owned by TI Media (A Telecom Italia company), and since 2013 by Cairo Communication Group, through its new company La7 s.r.l.. LaEFFE is also a recent private TV channel owned by the publisher Feltrinelli Group and it distributes on the digital terrestrial channel and through satellite.

Regarding distribution, Italy is a country historically characterised by the predominance of the reception of terrestrial transmissions with a 84.4% of the audience share. The analogue switch-off throughout the country was completed on 4 July 2012. The DTT network is made up of fifteen multiplexes offering a large number of free and paid channels, including over forty free-to-air channels and some fifty paid channels. These are higher figures than those of other European markets. In addition to the national channels, more than 200 stations were available free of charge in the first semester of 2013.

Two national pay-tv platforms and several other regional platforms coexist in Italy. The national ones are the digital terrestrial platform Mediaset Premium (Mediaset group) and the satellite TV Sky Italia operated by 21st Century Fox that through its subsidiaries Sky Italia and Fox Italia, operates more than 90 channels in Italy, 25 of which target other countries.



Dieci Inverni, 2009 – Production Company: Raicinema



RAI

Rai 1 is the flagship television station of RAI, Italy's national public service broadcaster, and the most watched television channel in the country. Rai2 is one of the three main television channels broadcast by Italian public television company RAI alongside with Rai 1 and Rai 3. Rai 3 is the third channel of Rai and it offers many public service programmes. Rai Movie, launched in 2003 as RaiSat Cinema World and re-badged in 2006 as RaiSat Cinema, on May 18, 2010 the channel has been re-launched as Rai Movie. It broadcasts mostly Italian films, interview, backstage and documentaries. Rai 4 is an entertainment television channel, programming includes films, TV series and cartoons. Rai 5 has replaced Rai Extra. It broadcasts programs about art, fashion, dance, opera, theatre, cuisine, travel, documentary films and TV Drama..

Piazza Adriana, 12
00193 Roma
Italy

T: 0039 06 684701

www.raicinema.it

Andrea Portante
Head of acquisitions
andrea.portante@raicinema.it

Marina Chiaravalle
Buyer
marina.chiaravalle@raicinema.it

Cristina Venturi
Acquisitions
crisitna.venturi@raicinema.it

ITALY



MEDIASET

Canale 5 is a classic generalist channel, aimed at the mass family audience. Italia 1 is the Mediaset Group's youngest channel, paying particular attention to the tastes of its audience. Retequattro: offers programmes of traditional shows, much appreciated by women viewers, with programmes aimed at a male audience. Mediaset Italia 2 is a channel dedicated to younger male viewers: TV series, sitcoms, cult cartoons and sports and music programmes. Mediaset Extra is a new thematic channel that offers a selection of archive and current entertainment programmes from the Mediaset network. La5 is the free digital terrestrial channel that offers scheduling dedicated to a modern feminine audience. Iris is a thematic channel dedicated to quality films, although it also broadcast programmes about cinema news, film stars and the most important film festivals

Via Aurelia Antica 422
00165 Roma

T: 0039 06 66390566
F: 0039 06 6639 0650
internationalsales@mediaset.it

www.mediasetdistribution.com

Zelda Stewart
Head of Acquisitions Mediaset
zelda.stewart@mediaset.it

Giorgio Giovetti
Head Of Sales Department
giorgio.giovetti@mediaset.it

Manuela Caputi
International Sales Manager
Manuela.caputi@mediaset.it

ITALY



SKY ITALIA SRL

Sky Italia S.r.l. is an Italian digital satellite television platform owned by News Corporation launched on 1st August 2003, when the former platforms Tele+ (Canal+) and Stream TV (News Corporation and Telecom Italia) merged together. It is similar in many ways to BSkyB's Sky Digital in the United Kingdom and Ireland, and like that network it is a major sports broadcaster

Via Monte Penice 7
20138 Milano
Italy

T: +39 02 308017269

www.sky.it

Giovanna Milone
Buyer
giovanna.milone@skytv.it
+39 02 308012266

Luca Pelusi
Buyer
luca.pelusi@skytv.it
+39 02 308017510

ITALY



LA7 S.R.L.

La7 and La7d are private television channels and they are owned by Cairo Communications. Their programmes are typically oriented to information, films, entertainment and sport.

Via della Pineta Sacchetti 229,
00168
Roma

T: +39 0635584228

www.la7.it

Francesco Valle
Acquisition Executive
francesco.valle@la7.it

ITALY



LA EFFE TV

La EffeTv is a media company of Gruppo Feltrinelli. The show schedule is characterized by information, culture and entertainment, among which Cinema and TV Series.

Via Andegari, 6
20121 Milano

T: +39 02 725 721

www.laeffe.tv

Riccardo Chiattelli

Head of Content and Communication

riccardo.chiattelli@feltrinelli.it

ITALY



LATVIA

The last couple of years in the television market in Latvia were marked by a substantial investment by the Latvian public broadcaster, LTV, into original content production, which led to its market share growing to 10 %. LTV is now among top three channels in the country. The remaining two are TV3 (11.9%), a private channel broadcasting in the Latvian language, and PBK (9.0%), a private channel broadcasting in the Russian language. (Audience data: TNS)

The distribution of television services is dominated by the cable operators, which supply about 40% of households. The two main providers are Baltcom and Izzi, who merged during September 2013, when AXA Private Equity, the company owning Baltcom, acquired the control of Izzi. They claimed that the two companies will keep operating as separate legal entities. The incumbent operator Lattelecom, 51% owned by the Latvian state and, indirectly, 49% owned by Sweden's TeliaSonera group, is present in the other distribution market segments. The company markets the country's main IPTV platform and operates the only digital terrestrial television platform. DTT was launched in Latvia in 2009 and, after a brief transition period, analogue terrestrial transmissions were switched off in June 2010. The investigation opened by the Latvian competition authority against Lattelecom in March 2010 for abuse of its dominant position on the pay-TV market was discontinued in September 2011.

SOURCE: Creative Europe Desk Latvia; MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



Piano Player, dir. Ilona Bruver, Kinolats, 2014



LATVIAN TELEVISION (LTV)

Latvian Television (LTV1 and LTV7) is a public service broadcaster, established in 1954, a member of the EBU since 1993. 60% of its funding is directly allocated by the government, while the rest must be earned by commercial activity. LTV1 is a generalist public channel, with mainly in-house productions, content commissioned from the independent sector in Latvia, as well as acquired content of European origin. The in-house drama production had been limited in the previous years, but has now become a strategic priority. There are currently original drama series in production, the first to be premiered on LTV1 in the autumn season of 2015. LTV7 aims to provide innovative content to younger audiences, focusing on factual entertainment and documentaries, as well as sports.

Public Ltd Latvian Television
Zakusalas Embankment 3
Riga LV1059
Latvia

www.ltv.lv

Sarlote Liduma
Head of Acquisitions
sarlote.liduma@ltv.lv

Elita Kornilova
Content Manager
elita.kornilova@ltv.lv
+371 6720 0336



LITHUANIA

In recent years the audience market shares of most private channels have been upgrading, television has remained highly important way to spend free time the citizens of Lithuania. Two private channels continued to lead the Lithuanian market: TV3 (Swedish group MTG) remained top channel (17.2%), ahead of LNK (MG Baltic Group), at 17.1%. Despite a drop, LRT, the main channel of public service broadcaster LRT, is in third position (8.8%). After these, there is only one channel with a share above 7%: BTV (Achemos Group).

(Audience data: Eurodata TV Worldwide / TNS LT).

The market is dominated by the cable operators (and MMDS providers), of which the main providers are the second largest cable operator Cgates, who was created after the merger in 2011, and Init, who merged during 2012, when Vinita, Palsatas and Telekomika merged to a single Init company. The cable networks, which still have a low digitisation rate, are facing competition from other digital platforms, which include the Viasat satellite package and various IPTV services, dominated by Teo LT (68% owned by Sweden's TeliaSonera group).

SOURCE: MAVISE Database — a database
provided by the European Audiovisual
Observatory on behalf of the DG Communication
of the European Commission.



LRT

Lithuanian National Radio and Television (LRT) is a non-profit public institution that has been providing regular radio services since 1926 and television broadcasts - since 1957. LRT operates three national television channels (LRT Televizija, LRT Kultūra, LRT Lituanica) and three radio channels (LRT Radijas, LRT Klasika, LRT Opus), also news website www.lrt.lt. LRT is funded directly from the State budget and has no advertising since the 1st January, 2015. Its activities are supervised by the LRT Council.

S. Konarskio St. 49,
LT-03123,
Vilnius

T: +370 5 236 3209
lrt@lrt.lt

www.lrt.lt

Mrs. Junita Budvytiene
Head of TV Acquisition
junita.budvytiene@lrt.lt

Mr. Viktoras Snarskis
TV Programming Director
viktoras.snarskis@lrt.lt

LITHUANIA



UAB „TELE-3“

TV3, TV6 and TV8 channels are a part of international entertainment group – MTG (Modern Times Group). TV3 television – Nr.1 in Lithuania for 11 years! TV3 brings the best movies, TV series and local programs. Channel slogan – It is good to be together, so everyone is invited to turn on TV and enjoy the magical world of entertainment. If you want a bit more “edgy” program with a taste of best sports – UEFA, Formula 1 and basketball – turn on TV6. Mature women are invited to relax while watching love movies and TV series while watching TV8 channel.

Kalvarijų str. 135,
Vilnius,
Lithuania,
LT-08221

T: 370 5 203 01 02
F: 370 5 203 01 03
info@tv3.lt; biuras@tv3.lt

www.tv3.lt
www.tv.tv3.lt
www.tv3play.lt



LAISVAS IR NEPRIKLAUSOMAS KANALAS

Free and independent channel. Channels: LNK, BTV, TV1, Liuks!, Info TV

Šeškinės St. 20,
LT-07156 Vilnius

T: +370 5 243 1058
info@lnk.lt

www.lnk.lt



LITHUANIA



BALTICUM TV

Channels: Balticum TV, Balticum Auksinis


Taikos Av. 101,
LT-94198 Klaipėda

T: +370 46 390 700
info@balticum-tv.lt

www.balticumtelevizija.lt



LITHUANIA



LIETUVOS RYTO TELEVIZIJA (LIETUVOS RYTAS TV)

“Lietuvos ryto” TV was launched at October 2008 as a part of “Lietuvos rytas” Media Group. It’s commercial Free-to-Air channel, Internet simulcast is available as well. TV channel is oriented to general audience. There are daily News every hour starting midday until 10:30 PM, local produced shows, journalistic investigations, game-shows, movies, documentaries, TV series - all interesting and attractive genres. We are opened for a new ideas!

Gedimino Av. 12A,
LT-01103, Vilnius

T: +370 5 274 3718
tv@lrytas.lt

tv.lrytas.lt

Linas Ryškus
Director General
linas.ryskus@lrytas.lt
+370 5 2743718

Kristina Kulionienė
**Head of Programming and
Acquisitions**
Kristina.kulioniene@lrytas.lt
+370 5 2657311

LITHUANIA



LUXEMBOURG

Luxembourg has long had an official policy of welcoming pan-European companies. It is home, for example, to SES Global – the world's leading satellite operator thanks to its Astra system, the RTL Group, Europe's leading audiovisual group, and M7, the satellite platform that distributes channel packages. In the field of on-demand audiovisual services, Luxembourg acts as a host country for the provision of cross-border services and is home to the iTunes Store (Apple) and other services. Microsoft's Xbox Live is also based in Luxembourg but is considered a distribution platform by the authorities and not an on-demand audiovisual service.

The law on the creation of the public service body *Autorité luxembourgeoise indépendante de l'audiovisuel* (Luxembourg Independent Audiovisual Authority – ALIA) was formally adopted on 27 August 2013 and entered into force on 1 December 2013. It reforms Luxembourg's regulatory bodies by replacing most of the former authorities by a single competent authority.

The audience share of RTL Lëtzebuerg in 2012 was 35.4% between 7 and 8 pm but continued to decline during the daytime. According to the 2012 Plurimedia Survey conducted by TNS Ilres, RTL Tele Lëtzebuerg reached 114 800 viewers (or 26.1% of the population), while the channel Den 2ten RTL reached 9000 (2%). CLT-UFA operates Luxembourg's digital terrestrial platform, which provides access to 13 channels, eleven of which are controlled by the RTL Group. The two independent channels are Luxe TV and Air TV, a new general entertainment channel launched in February 2011.

Cable, which supplies nearly two-thirds of households, dominates in Luxembourg. Most of the fifty or so operators identified in the country are local authorities or nonprofit associations. In 2013, only three companies were still operating in this sector. Eltrona dominates the market with the Imagin package, which had 115 000 subscribers at the end of 2010. Its main competitors are Sogel and Numericable, which was taken over in July 2011 by the Luxembourg based companies Deficom (60%) and Apax (40%). The telecommunications operator *Entreprise des P&T*, renamed Post Telecom, is a significant competitor in the pay-TV market, with its package, PostTV, which had signed up 22 000 subscribers by the end of 2011. The Belgian operator Belgacom has also gained a foothold on the market by setting up a subsidiary, Tango SA.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



RTL TELÉ LËTZEBUERG AND 2TEN RTL TELÉ LËTZEBUERG

45, Boulevard Pierre Frieden
L-1543 Luxembourg
Luxembourg

T: (+352) 42 142-810

www.rtl.lu



LUXEMBOURG



MALTA

Public Broadcasting Services Ltd. is an independent public service provider. It has two national TV channels - TVM and TVM2 – plus three national radio channels. These are all financed by advertising and a public service grant for specific programs of national interest. While TVM is the national broadcasting channel catering for all types of audiences, TVM2 is an informative and cultural channel with a strong documentary profile.

Both channels are broadcast free-to-air, on the cable system, on the digital aerial, and in HD format. PBS Ltd also operate the national HDTV platform which carries other national commercial and political TV stations..

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



PUBLIC BROADCASTING SERVICES LTD.

75, St. Luke's Road,
G'Mangia PTA 1022

T: 2291 3100

www.tvn.com.mt

Mr Reuben Zammit
Programs
rzammit@pbs.com.mt

Sales
mmicallef@pbs.com.mt
cfella@pbs.com.mt

MALTA



NETHERLANDS

The most important players in the Dutch market are the public broadcasters, with the national channels NPO 1, NPO 2, NPO 3, and all the digital channels grouped together under the Ned 24 banner, as well as the RTL group, whose channels RTL 4, RTL 5, RTL 7, RTL 8 and RTL Lounge are transmitted under Luxembourg law. The third provider, SBS Broadcasting (NET 5, SBS 6 and Veronica), was sold by ProSiebenSat.1 Media AG in May 2011 to John de Mol's Talpa Media group, which is associated with the Finnish group Sanoma.

In 2010, the daily audience share of NPO 1 rose by 1.5%, thus enabling the channel to reach 21.5%, which was higher than the figure posted in 2008. Following the public channel in audience share terms are the private channels RTL4 and SBS6 with 14.4 and 10% respectively. Their market shares have actually risen in the past two years. The two other public channels (NPO 2 and NPO 3) each have a daily share of slightly under 7%, while the figure for the four private channels - NET 5, RTL 7, RTL 5 and Veronica - is between 3 and 5%. Eight other channels have a daily audience of between 1 and 2%. (Audience data source: Eurodata TV Worldwide / Stichting Kijkonderzoek).

The Dutch public service broadcasting system is made up of some 20 national, 13 regional and 350 local broadcasters.



Alleen op de Wereld, produced by Lemming Film - 2015



Hollands Hoop, directed by Dana Nechushtan, produced by Lemming Film, VARA, VPRO, NTR - 2014



AVROTROS

Since the first of January 2014 AVRO merged with broadcaster TROS, now they operate under the name AVROTROS.

PO Box 2 1200
JA Hilversum
The Netherlands

T: +31 (0) 35 671 77 15
info@avrotros.nl

www.avrotros.nl

Simone van den Ende
Head of Arts&Culture and Drama
simone.vandenende@avrotros.nl

NETHERLANDS



BNN-VARA

Since the first of January 2014 BNN merged with broadcaster VARA, now they operate under the name BNN-VARA. Both parties keep their own name and target different audiences. BNN targets teenage and young adult audiences. It produces entertainment and informative television programs, radio programs, and feature films.

Omroepvereniging BNN-VARA
Postbus 175
1200 AD Hilversum

T : +31 (0)35 655 53 33 (BNN)
bnn-info@bnn.nl
T: + 31(0) 35 671 1911 (VARA)
publieksservice@vara.nl

www.bnn.nl
www.vara.nl

Mark Furstner
mark.furstner@bnn.nl
+31(0)35 655 5333

Gemma Derksen
Head of Drama
Gemma.derksen@bnnvara.nl

NETHERLANDS



KRO-NCRV

Since the first of January 2014 KRO and NCRV and RKK merged. Now they operate under the name KRO-NCRV.

NCRV
Postbus 25000
1202 HB Hilversum
KRO
Postbus 200
1200 AE Hilversum

T: +31 (0)35 - 672 68 90 (NCRV)
T: +31 (0) 35 671 3911 (KRO)
infolijn@kro-ncrv.nl

www.kro-ncrv.nl

Brigitte Baake
Head of Drama

NETHERLANDS



EO

EO is financed by the Dutch government. It transmits on Nederland 1, 2 and 3 which are national channels that transmit by cable and terrestrial network.

PO Box 21000
1213 AC Hilversum
The Netherlands

+31(0)35 647 4747
eo@eo.nl

www.eo.nl

Jacomien Nijhof
**Commissioning Editor Drama and
Innovation**
jacomien.nijhof@eo.nl

NETHERLANDS



HUMAN

The Humanistische Omroep (HUMAN) is one of the smaller public broadcasting organizations in the Netherlands. It is a public service association. HUMAN produces programmes for Dutch television, makes radio talkshows and interactive websites.

PO Box 135
1200 AC Hilversum
The Netherlands

+31(0)35 672 2020
secretariaat@human.nl

www.human.nl

Bert Janssens
Director and Commissioning Editor
bert.janssens@human.nl

NETHERLANDS



OMROEP MAX

Omroep MAX is a station broadcast in The Netherlands. MAX's programming focuses on people aged 50 years and older. MAX transmits on Nederland 1 and Nederland 2.

PO Box 518
1202 BA Hilversum
The Netherlands

+31(0)35 677 5409
info@omroepmax.nl

www.omroepmax.nl

Mascha van Erven
mascha.van.erven@omroepmax.nl

NETHERLANDS



NTR

NTR is the independent Dutch public service broadcaster specialising in information, education and culture. NTR's themes are based on the statutory duties of the three public service broadcasters which in 2010 merged into NTR: NPS, Teleac and RVU.

PO Box 29000
1217 GP Hilversum
The Netherlands

T: +31(0)88 100 3100
F: +31 (0)88 100 3138
publiek@nps.nl

www.ntr.nl

Marina Blok
Commissioning Editor Drama
marina.blok@ntr.nl

NETHERLANDS



VPRO

VPRO is one in the group of the 9 biggest broadcasting associations in the Netherlands. It is financed by license fees and advertising. There are 3 public channels in the Netherlands that transmit by free cable, free satellite, free terrestrial and free digital television. VPRO can be found on all 3 channels.

PO Box 11
1200 JC Hilversum
The Netherlands

T: +31(0)35 671 2911
F: +31(0)35 671 2100
info@vpro.nl

www.vpro.nl

Joost de Wolf
Commissioning Editor Drama
j.de.wolf@vpro.nl

NETHERLANDS



NORWAY

In Norway NRK remains the leading broadcasting group with a daily market share of 41% for their three public channels (NRK1, NRK2 and NRK3), NRK1 with 30.2%, is the most watched. The TV 2 group have five channels and a combined market share of 24.8%, TVNorge (Discovery Networks Norway) trailing behind with 7.4% and TV3 (Modern Times Group) with 4.2%. (All figures from 2012)

TV3 (MTG) and Viasat 4 (MTG) are established in the UK, requiring them to comply with the Audiovisual Media Services Directive (AVMSD) but not with specific provisions under Norwegian legislation, particularly in respect of programming and advertising.

Several new channels have emerged in the Norwegian market in the last years. Satellite TV distributor Viasat (MTG) has restructured its sports channels package, launching Viasat Sport and Viasat Motor. The two main private channels TVNorge and TV 2 launched HD versions. Frikanalen, an open, non-commercial channel owned by around sixty nongovernmental organisations was launched in 2008. And in recent years Norwegian newspapers and media publishers have started investing in, and are breaking new ground with online streaming TV-channels, with VGTV owned by Schibsted as the largest player.



Occupied (Yellow Bird Norway AS) has received funding from the TV-programming scheme of the MEDIA programme. (Photo: Aksel Jermstad)



NRK NORSK RIKSKRINGKASTING (THE NORWEGIAN BROADCASTING CORPORATION)

Norsk Rikskringkasting (The Norwegian Broadcasting Corporation) is the Norwegian government-owned broadcasting company. It is non-commercial and based on public service principles. NRK is the largest media organisation in Norway. It is a founding member of the European Broadcasting Union.

Bj. Bjørnsons Plass 1
0340 Oslo
Norway

T: +47 23 04 70 00
tone.ronning@nrk.no

www.nrk.no

Tone Rønning
Commissioning Editor
tone.ronning@nrk.no

+47 90967780

NORWAY



TV2 NORWAY

TV 2 is the largest commercial television station in Norway and the second largest TV station in Norway. TV 2 started to broadcast in 1992, based on a governmental license to broadcast national commercial terrestrial television.

Nøstegaten 72
Postboks 7222
5020 Bergen
Norway

T: +47 915 02255

www.tv2.no

Christopher N. Haug
Head of Drama
Christopher.Haug@tv2.no
+ 47 95 19 36 06

Jarle Nakken
Programme Director
jarle.nakken@tv2.no
+47 90866067

NORWAY



MTG TV

MTG TV, the former TV3 Norway is part of Modern Times Group, the channel also represents, Viasat 4 (viasat4.no), TV6 (tv6norge.no) and MTV (mtv.no) with play-channels in Norway.

Postboks TV3 Youngstorget
0028 Oslo
Norway

T: +47 22 99 00 33

www.tv3.no

Lars Olav Vartdal
Head of Formats and Development
Tv3/ Viasat 4
Lars.Olav.Vartdal@mtgtv.no
+47 90 59 62 96

Hilde Kollerød
Head of Schedule
hilde.kollerod@mtgtv.no
+ 47 97 18 08 87

NORWAY



TVNORGE

TVNorge is Norway's second largest commercial channel and went on the air in 1988 as the first advertising supported channel in Norway. TVNorge is part of Discovery Networks Norway that also includes TV channels FEM, VOX, MAX, TLC and Discovery.

Discovery Networks Norway
Nydalén Allé 37
0484 Oslo
Norway

Benedicte Steinsrud
Head of Acquisitions
Benedicte_steinsrud@discovery.com
T: +47 21 02 20 00
M: +47 930 32 444

Sverre Nordbø
Head of Programming
Sverre_nordbo@discovery.com
T: +47 21 02 20 00
M: +47 932 01 891

Rasmus Øyen
Head of Comedy
Rasmus_oeyen@discovery.com
T: +47 21 02 20 00
M: +47 934 34 040

NORWAY



POLAND

The Polish TV market is dominated by three commercial entities (TVN group, Polsat group, nc+) and one public broadcaster (TVP), which held a total of 95% of the market share. Three main private channels present respectively: 33% (Polsat group), 28% (TVN group) and 16% (nc+) shares on the market. The public broadcaster (TVP) has 18% of the market share. The rest of TV market is divided between independent providers and local broadcasters.

In term of major audience market share the public channel TVP1 still heads daily audience figures, with a 12,3% market share (compared with 12,95% in 2013). TVP2, the second public channel presents a 9,4 % shares on the market. The public channels (TVP1, TVP2, TVP Kultura, TVP Info, TVP Rozrywka, TVP Seriale, TVP Sport, TVP Historia, TV Polonia, TVP ABC, TVP HD, TVP Regionalna) have a daily audience market share of 31 % (an increase of 2,5% compared to 2013). Two main private channels, Polsat and TVN have seen their audience dwindle: their market share at the end of 2014 was 11,8% and 11,7% respectively. (Audience data source: KRRiT, Nielsen Audience Measurement)

Following these four channels (TVP1, TVP2, Polsat, TVN), there were eleven that commanded between 3,5% and 1,1% of the audience market share. The fragmentation of the audience is encouraging the most important groups that observe the audience of their main channels shrinking, to increase the number of special interest channels.



POLSAT

Polsat is an open TV channel that belongs to Polsat Group. It buys movies for all rights. The channel is also available in North America. Polsat airs 168 hours per week. Polsat is the 2nd national TV channel available via the terrestrial analogue network. It belongs to the Polsat group of channels which includes: Polsat Film, Polsat News, Polsat Sport, Polsat Sport Extra, Polsat Café, Polsat HD, Polsat Play and Polsat Romans. The broadcast programming of Polsat is targeted on general audience.

Telewizja Polsat Sp. z o.o.
Ul. Ostrobramska 77
04-175 Warszawa
Poland

T: +48 22 514 53 00

www.polsat.pl

Anna Kozanecka
**Head of Film Acquisitition and
Programming**
akozonecka@polsat.com.pl
+48 22 514 52 74

Magdalena Janeczek
Licensing Department Director
mjaneczek@polsat.com.pl

POLAND



TVP

TVP is a Polish public station, operating 2 nation-wide channels (TVP1, TVP2) a number of thematic channels: TVP Info, TVP Kultura, TVP Sport, TVP History, TVP ABC, TVP Rozrywka, TVP Seriale and a satellite channel TVP Polonia. Its main activity is in broadcasting, production, worldwide distribution and acquisition.

Telewizja Polska S.A.
ul. Woronicza 17
00-999 Warszawa
Poland

T: +48 22 547 85 14
F: +48 22 547 81 50
sekretariat@tvp.pl

www.tvp.pl

Ewa Dabrowska
Head of Film Acquisitions
ewa.dabrowska@tvp.pl
+48 22 547 7230
M: +48 601 600 032

Wojciech Diduszko
Programme Buyer TVP Kultura
wojciech.diduszko@tvp.pl
+48 22 547 29 85

Tomasz Kolankiewicz
Programme Buyer TVP Kultura
kolankiweicz@tvp.pl
+48 22 547 86 97

Beata Pacak
Programme Buyer Films TVP1
beata.pacak@tvp.pl
+48 22 547 81 14

POLAND



NC+

nc+ is an advanced digital platform with the richest offer, established by the merger of the two market leaders: CYFRA+ and n. It has more than 140 selected channels of the highest quality, including more than 50 in HD, and gives access to more than 600 FTA channels. nc+ offers the most prestigious sport events and the latest film premieres straight from cinemas, available on its own six premium channels: CANAL+ HD, CANAL+ Film HD, CANAL+ Film2 HD, CANAL+ Family HD, CANAL+ Family2 HD and CANAL+ Sport HD. nc+ platform is also the broadcaster of wide range of thematic channels – Ale kino+, channel for movie enthusiasts, documentary Planete+, lifestyle Domo+ and Kuchnia+, MiniMini+ and teleTOON+ dedicated to children as well as nSport+, the first layer of access to the best nc+ sporting events.

ITI NEOVISION S.A.
Al. gen. Wł. Sikorskiego 9
02-758 Warszawa
Poland

T: +48 (22) 32 82 701
F: +48 (22) 32 82 750

www.ncplus.pl

Olga Wieczorek
Programming Purchasing Manager
Olga.wieczorek@ncplus.pl
+48 (22) 32 82 677

Joanna Rathe
**Programming Manager for
Kuchnia+, Domo+ and Planete+.**
Joanna.rathe@ncplus.pl
+48 (22) 32 82 503

Aleksandra Kurcz
Senior Aquisitions Specialist
Aleksandra.kurcz@ncplus.pl
+48 (22) 32 82 550

POLAND



HBO POLAND

HBO Poland is the Polish subsidiary of the Home Box Office (HBO). HBO Poland is a paid television station.

HBO programming consists primarily of theatrically released motion pictures and original television series, along with made-for-cable movies and documentaries, boxing matches and occasional stand-up comedy and concert specials. It operates several channels: HBO, HBOz, HBO Comedy.

HBO Polska Sp.zo.o.
ul. Puławska 17
02-515 Warszawa
Poland

T: +48 22 852 88 00
kontakt@hbo.pl
info@hbo.pl

www.hbo.pl

Michał Walewski
Sales Director
m.walewski@hbo.pl

POLAND



TVN

TVN is the leading free-to-air channel in Poland. Additionally, TVN Group operates 3 other FTA channels TVN 7, TTV and local NTL Radomsko as well as seven thematic pay channels: TVN 24, TVN Style, TVN Turbo, TVN24 Biznes & Swiat, TVN Meteo, ITVN and Mango. TVN also offers an extensive portfolio of online products including internet VOD service Player.pl.

TVN S.A.
ul. Wiertnicza 166
02-952 Warszawa
Poland

T: +48 22 8566060
tvn@tvn.pl

www.tvn.pl
www.distribution.tvn.pl

Aneta Zareba
Sales Manager
aneta.zareba@tvn.pl
+48 502 555 098

Anna Borys
Head of Acquisition Team
a.borys@tvn.pl

Anna Wasniewska
Film Development Producer
a.wasniewska@tvn.pl
+48 694 411 146

POLAND

PORTUGAL

The Portuguese television market is dominated by three channels, which had a combined audience share of 59.8% in 2012. Due to a change of methodology and panel introduced in March 2012, the comparison of data between 2012 and former years should be done with care. TVI (Grupa Media Capital) still had the best market share (24.2%). With 21.7% in 2012, SIC regained the second place it had lost in 2009, benefiting from a huge drop in the audience of RTP1 (24.2% in 2010, 21.6% in 2011, 13.9% in 2012). The audience share of the second public service channel RTP2 also fell from 4.5% to 3.4%. (Audience data sources: Eurodata TV / Marktest - Audimetria / Mediamonitor)

According to ANACOM (National Communications Authority), in the second quarter of 2013 about 1433 million households were able to receive TV by cable, which was a decrease of 2.6% compared to the same period of 2012, while 633 000 subscribe to satellite packages, registering a loss of 2.1% compared to the previous quarter of 2013, and 35 000 fewer than the same period in 2012 (-5.3%). The number of subscribers to a fibre optic pay-TV service has been increasing during recent years, rising from 307 000 in 2012 to 434 000 for the same period of 2013, with an increase of 27%. IPTV (DSL/ IP) has become the second most important technology (after cable) in terms of number of subscribers in Portugal, (644 000 in the second quarter of 2013, with an increase of 3.4% if compared to the beginning of the year).

Several pay-TV operators offer services on different platforms. According to ANACOM data, Zon Multimedia is still the main pay-TV player in Portugal, controlling 49% of the pay-TV market through its cable and satellite broadcasting subsidiary Zon TV Cabo. Portugal Telecom, which offers the Meo TV service (satellite and IPTV), has 40.4% of subscribers, while the company Cabovisao (sold in March 2012 by the Canadian company Cogeco Cable to the European group Altice, the operation receiving a green light by national competition authority) is the third player in the pay-TV market with a share of subscriptions of 7.4%. Apart from Meo TV, there are two other IPTV services available in Portugal: Sonaecom (a subsidiary of Sonae and France Télécom) which offers the triple-play service (ClixTV); and Vodafone which offers "Vodafone TV" as part of double and triple play services.

The introduction of DTT was initiated in early 2008 with one tender for a free-to-air Multiplex (A) and a second tender for five Multiplexes providing pay-TV services (two with national coverage B and C, and a further three on partial territorial coverage, D, E and F). PT Comunicações (Portugal Telecom) was awarded the license for the free-to-air Multiplex, and the service was officially launched in April 2009. It carries the four national terrestrial channels (RTP1 and 2, TVI and SIC) and two autonomous regional channels. The total switch-off of the analogue signal took place in April 2012. The fact that digital terrestrial television only offers four general-interest channels is also the subject of discussion. During a Parliamentary hearing, Portugal's Minister of State and Regional Development, Miguel Piores Maduro, stated that the Government believes that the current supply of DTT in Portugal is "insufficient" and should be increased, and that during 2014 two new free-to-air channels should be added.

SOURCE: MAVISE Database
– a database provided by
the European Audiovisual
Observatory on behalf of the DG
Communication of the European
Commission.



Small Village Of Beirais



RTP

RTP is a corporation which broadcasts Radio & TV channels of public service, under concession contract, since its foundation (1957). RTP is 100% owned by the Portuguese state, mainly supported by license fees and commercial income, mostly from advertising and sponsorship. RTP produces and broadcasts 8 different television channels and 8 different radio channels, serving a wide array of audiences in Portugal and abroad.

RTP – Rádio Televisão de Portugal
Av. Marechal Gomes da Costa, 37
1849-030 Lisboa
Portugal

T: +351 217 947 000
F: +351 217 947 570

www.rtp.pt

Daniel Deusdado
Director of Programming RTP1
daniel.deusdado@rtp.pt
+351 217 947 377

Teresa Paixão
Director of Programming RTP2
teresa.paixao@rtp.pt
+351 217 945 883

José Navarro de Andrade
Consultant of Internal Acquisitions
Jose.navarro@ext.rtp.pt
+351 217 947 461

Isabel Carvalho
Head of Acquisitions
isabel.carvalho@rtp.pt
+351 217 947 179

PORTUGAL



S.I.C.: SOCIEDADE INDEPENDENTE DE COMUNICAÇÃO, S.A.

SIC is the first private television channel in Portugal. It started to broadcast, through FTA, on October 6, 1992, contributing to the plurality and independence of news and diversity of entertainment. In just three years, in May 1995, SIC lead the race in audience rating through its strong focus on news programs, entertainment, factual and fictional series, all spoken in Portuguese. Always in search of innovation, in 2000, SIC entered the world of cable channels and in 2007 entered the digital age with interactive and multi-platform content. SIC produces and broadcast 7 television channels for Portugal and abroad, with a main FTA channel, an international chan-

S.I.C. – Sociedade Independente de Co-
municação, S.A.

Estrada da Outurela, 119
2794-052 Carnaxide
Portugal

+351 214 179 400

www.sic.pt

Vanessa Tierno
Head of Acquisitions
vanessatierno@sic.pt

Content Sales
Carlota Vieira
sales@sic.pt

PORTUGAL



TVI

TVI is the leading FTA TV Channel in Portugal, since 2000. In 2014, the channel registered a share of 23.5% in all day and of 26.5% in prime time, driven by its entertainment, local drama and news offers. Aside from the FTA TV channel TVI, the company, owned by Media Capital Group, also owns the Pay TV channels TVI24, TVI Ficção, TVI Internacional and +TVI. TVI's group of channels led audiences in 2014 both in all day and prime time, with shares of 25.5% and 28.1%, reaching a daily average audience of 5,212 million viewers (43.7 million in prime time). TVI's portfolio also includes TVI Direct, a pay tv channel for the live transmission 24hrs/day of the main channel's reality shows.

TVI
Rua Mário castelhano nº 40
2734-502 Barcarena,
Portugal

00351 21 434 75 00

Luís Cunha Velho
General Director

Bruno Santos
Director of Programming

Margarida Vitória Pereira
**Director of Acquisitions &
International Programming**

PORTUGAL



CANAL Q

Born on 29 March 2010 and the Q channel is a channel of humor, entertainment and information. It is a channel in constant satire and desconstruction of the information and real life narratives of our time. It questions the established idea of what is a television channel. 90% of the programs are written, produced, performed, presented and interpreted from scratch, from ideas and original formats created exclusively for the channel. So it produces more than 40 hours a week. Channel Q is available on channel 15 of the MEO and NOS platforms, also in Angola, Mozambique, France, Luxembourg, Monaco and Andorra. In 2014, Canal Q received the award for Best National Entertainment Channel by Meios & Publicidade, one of the most recognize awards in Portugal. Also won one of the highest distinctions in terms of design with the Grand Prix of Media & Advertising.

Canal Q - Television Channel
Travessa Fábrica dos Pentes, nº 12, 9º
andar
1250-106 Lisbon
Portugal

21 380 65 00

www.canalq.pt

Goncalo Felix da Costa
**Programming Director Head of
Contents**
gfelix@canalq.pt
+351918500441

Gonçalo Fonseca
Head of Aquisitions
gfonseca@producoesficticias.pt
+351962708069

PORTUGAL



ROMANIA

In Romania, the main players in the television market are Central European Media Enterprises (CME) and the Intact Media Group. In 2012, the audience share of Pro TV (CME) was 14.7% and that of Antena 1 (Intact Media Group) was 11%. CME has a total market share of about 20% (including Pro Cinema, Sport.ro, Acasa and Acasa Gold), and Intact Media Group about 19%. The public service channels had a combined daily audience share of 7% in 2012 (down from 24.1% in 2006). In the Summer of 2012, TVR Info closed and TVR2 merged with TVR Cultural.

TVR Info relaunched as TVR News in co-operation with Euronews in 2012. The German media group ProSiebenSat1 AG left the Romanian market after selling its main channel to the Greek Antenna Media Group at the end of 2013. Romania is an important centre for thematic television channels that target other countries. These include also the Film+ channels (Czech and Slovak Republics, Hungary, Romania) all of which are part of the RTL Group.

Approximately 40 new national channels were licensed in Romania in the years 2012 and 2013, including channels from the operator RCS & RDS.

Cable was the most important platform in Romania (50% of households) at the end of 2012. RCS & RDS is considered the main player in the market with 1.6 million subscribers end 2012.



TVR (ROMANIAN NATIONAL TELEVISION)

TVR- TVR1, TVR2, TVR3, TVR International

Calea Dorobanților no 191, sector 1,
Bucharest cod 010.565

T: +4021.319.91.12
+4021.319.91.54
F: +40.21.319.91.24
tvri@tvr.ro
comunicare.corporate@tvr.ro
marketing@tvr.ro

www.tvr.ro

ROMANIA



ANTENA 1 , ANTENA 3 (INTACT MEDIA GROUP)

Bucuresti-Ploiesti Street , no. 25-27,
013682, Bucharest

T: +4021-203 01 18
stiri@antena3.ro

www.a1.ro



ROMANIA



INTACT MEDIA GROUP

Head office: Garlei Street, no. 1 B,
013721 Bucharest

T: + 40 21 40 91 861
+ 40 21 40 91 862
F: + 40 21 20 30 357
headoffice@intactmediagroup.ro

www.intactmediagroup.ro



ROMANIA



PROTV (CENTRAL EUROPEAN MEDIA ENTERPRISES), PROTV INTERNATIONAL

Pache Protopopescu Streer, No 105,
Sector 2, Bucuresti

T: +4021.9454
pr@protv.ro

www.protv.ro



ROMANIA



HBO ROMANIA

T: 0 8000 70 426

www.hbo.ro

ROMANIA



PRIMA TV (PRIMA BROADCASTING GROUP SRL)

Iride Business Park,
Dimitrie Pompeiu Street, no 9-9A,
Corp 20, 8th floor, sector 2, Bucharest

T: +40 21 589 5000

ROMANIA



NATIONAL TV

060825 Bucharest, Sector 6,
Fabricii Street, No. 46 B

T: 021/4042570
F: 021 4042429
office@nationaltv.ro

www.nationaltv.ro

ROMANIA



KANAL D

Blvd Marasti, nr 65-67,
Romexpo Intrarea D, Pavilion T, sector 1,
Cod postal 11465

T: +40 31 407 55 55
Call Center Kanal D: 021. 9667
info@kanald.ro

www.kanald.ro

ROMANIA



SLOVAKIA

In the Slovak Republic, the commercial channels dominate the market. The channels of Central European Media Enterprises (TV Markiza, TV Doma and Dajto) had a combined market share of 31.9% in 2012. The public service channels of STV had a combined share of 11.7%. The second commercial operator Mac TV had an audience share of 24.9% in 2012 (TV Joj and Joj Plus). (Audience data source: Eurodata TV Worldwide / PMT / TNS SK).

The commercial operators have launched a range of new channels in the Slovak Republic in 2012 and 2013: DajtoTV, Senzi TV, Fooor TV and Wau TV, all of which are available over free DTT.

Cable and satellite each deliver television services to around 40% of homes. In September 2013, the main cable operator, UPC (Liberty Global) had 194 500 subscribers, which was almost one third of the cable market. There are five satellite packages offered by three companies. The two packages Skylink and CS Link are part of Luxembourg company M7. Skylink is being promoted as a pay package, while CS Link is free. They serve a combined total of approximately 1.6 million homes in the Slovak and Czech Republics. DIGI TV is another important player and was purchased in 2013 by Slovak Telecom from RCS & RDS. UPC Direct (Liberty Global) had 62 200 subscribers in September 2013. A fifth satellite service was launched in 2010 when T-Com (Slovak Telecom) made the IPTV Magio service available over satellite. Magio had over 190 000 subscribers in September 2013 (to the IPTV and satellite services combined). IPTV is also offered by three other companies: Orange, Slovanet, and Swan.

Towercom operates four DTT Multiplexes. They carry three public service channels (including a PSB HD channel), and ten private channels. The Towercom subsidiary, Towerhome, launched pay DTT services in 2013 offering 12 additional channels. In 2011 Slovak Television (STV) and Slovak Radio (SRo) merged into a single public institution under the Act on Slovak Television and Radio of 15 December 2010. The Act also established a new system for financing of the public service. The strategy was to switch to state budget contribution to the financing. However, this system was never implemented. New legislation came into effect in January 2013 that re-instated the previous broadcasting fee for households.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

SLOVENIA

In Slovenia, the television market is dominated by the channels of the Central European Media Enterprises (CME) Group (Pop TV, Kanal A and the Pro Plus family of channels). These had an audience share of 36.6% in 2012. The channels of public service broadcaster RTV Slovenija, including regional channels had a strong share of 27.7% during the same period. In February 2012, another significant player TV3 (part of the Modern Times Group - MTG), ceased operating and left the Slovenian market claiming an unfair domination of the CME Group in the advertising market. This case is still pending with the competition authorities. (Audience data source: Eurodata TV Worldwide / AGB Nielsen Media Research Slovenia)

Cable served more than 30% of homes at the end of 2012. The main operator is Telemach (formerly Mid Europa Partners who sold its investment in Telemach to UnitedGlobalCom), with approximately 200 000 subscribers. Telemach has gradually been taking over smaller operators including Elektro Turnsek and Kabel TV in the summer of 2013.

More than 26% of Slovenian homes use IPTV services and three different services are available. SiOL (Telekom Slovenije) had approximately 126 636 subscribers in March 2013 (56% of the market). Further data from 2012 (Post and Electronic Communications Agency of the Republic of Slovenia - AKOS) shows that T2 had 32% of the market. The only satellite package, Total TV (Mid Europa Partners), launched in 2007, has approximately 25 000 customers.

The official DVB-T website reports reception problems in areas where there is interference from the Italian DTT transmissions. The main multiplex of RTV Slovenija has eight national and four regional channels. Six more local channels are provided on local multiplexes. Norkring (Multiplex B) left in February 2012 claiming that the public service broadcaster violated competition regulations by hosting commercial channels. Norkring dismantled the second Multiplex in Slovenia. A tender was launched for a third Multiplex (C) in October 2012, and this Multiplex was also granted to RTV Slovenija. In June 2012, the Media Act was amended providing for the cost free transmission of TV channels of special importance on the DTT multiplex operated by RTV Slovenija.

Also in June 2012, the Digital Broadcasting Act was amended to forbid the hosting of commercial TV channels on the public multiplex when other DTT multiplexes are available.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



PRO PLUS

The leading media company in Slovenia, PRO PLUS constantly generates new trends through the two Free TV channels with the greatest audience shares in Slovenia - POP TV and Kanal A, as well as through its Cable TV channels - BRIO, KINO and OT0. The company has a significant on-line presence through 24ur.com, Slovenia's most visited website, 7 specialised web portals and the first video on-demand internet service in Slovenia, VOYO.

Pro Plus D.O.O.
Kranjčeva 26
1521 Ljubljana
Slovenia

www.pro-plus.si
www.24ur.com
www.voyo.si

Branko Čakarmiš
Programming Director
branko.cakarmis@pop-tv.si
+386 (0) 15893231

Tomaž Kržičnik
Head of Acquisitions
tomaz.krzicnik@pop-tv.si
+386 (0) 15893231

Blaž Bezek
Programme development, Head of VOYO
blaz.bezek@pop-tv.si
+386 (0) 15893231

SLOVENIA



RTV SLOVENIA

RTV Slovenija is a Public Institution and non-profit organisation. It renders public service in the field of radio and television activities in accordance to the RTV Slovenija Act. It produces two national TV programmes (TV SLO Channel 1 and TV SLO Channel 2), two regional TV programmes (TV Koper - Capodistria and TV Maribor), TV programmes for Italian and Hungarian National Communities, three national radio programmes, regional radio programmes and the radio programme for foreign public. The Editorial Department for Acquired Drama Programmes is responsible for acquiring and programming of foreign fiction programmes. RTV Slovenia is devoted to quality programmes of all genres from all over the world. It has five weekly slots for feature films and six for TV series, while two slots are especially dedicated to European productions.

Kolodvorska 2
SI - 1550 Ljubljana
Slovenia

T: +386 1 475 21 57
F: + 386 1 475 21 50

www.rtv slo.si

Mr. Igor Palčič
**Commissioning Editor, Feature Films
/ Head of the Department**
igor.palcic@rtvslo.si
+386 1 475 32 51

Mrs. Bernarda Grum
Commissioning Editor, TV Series
bernarda.grum@rtvslo.si
+386 1 475 32 61

Mrs. Neli Vozelj
Head of Foreign Programmes
neli.vozelj@rtvslo.si
+386 1 475 21 61

SLOVENIA



SPAIN

In Spain, 2012 saw the private channels Telecinco (Mediaset Group) and Antena 3) outdoing the public channel TVE La Primera, with a daily audience share of, respectively, 13.9%, 12.5% and 12.2%. The trend of a steady loss of market share, already registered in the past 5 years, is due to audience fragmentation and the introduction of a plurality of niche channels. Other significant channels include Cuatro with 6.0% and La Sexta (created by a Spanish- Mexican consortium in 2006) with 4.9%. The niche channel Antena.neox (with a focus on youth entertainment) has moved above the second public service channel TVE La 2: their shares are 2.6% and 2.5% respectively.

The economic difficulties and the reduced ability for consumer spending have affected the pay-TV market, which, according to the quarterly report for the period April-June 2013 released by Comisión del Mercado de las Telecomunicaciones (CMT), is experiencing a deep crisis with a total loss of 502,190 subscriptions from the same period in 2012. The loss seems to be affecting all of the operators. The market is still dominated by the satellite package Canal+ with more than 1 700 000 subscribers in March 2013.

On the 15th February 2013, the Spanish Government approved the Digital Agenda for Spain, establishing the Government's strategy for the development of the economy and digital society in Spain for the period 2013-2015, with the aim to fulfill the goals set by the Digital Agenda for Europe strategy for 2015 and 2020.

On 4 June 2013, a new regulatory body, la Comisión Nacional de los Mercados y la Competencia (CNMC), was established. It is an independent body, which will merge almost all of the existing regulatory agencies.

On 1 August 2012, an amendment to the Audiovisual Act 7/2010 was adopted by the Spanish parliament, introducing a new legal framework for regional public service broadcasters, which aims at allowing regional public service broadcasters greater flexibility in the provision of their audiovisual media services.



ANTENA 3

Antena 3 is a private Spanish terrestrial channel. Its programming is generalist. When it was launched, Antena 3 was the first national private channel in Spain. It is controlled by Planeta de Agostini and RTL Group.

Avda. Isla Graciosa 13,
28703,
San Sebastian de los Reyes,
Madrid
Spain

T: 0034916230500

www.antena3.com

Mercedes Gamero
Director of Acquisitions and Sales
minigo@antena3t.es

Javier Iriarte Moreno
Programming Deputy Manager
minigo@antena3t.es

SPAIN



ARAGON TELEVISION

Aragon Television is the autonomous regional channel in Aragon.

Avda. Maria Zambrano 2,
50018 Zaragoza
Spain

www.aragontelevision.es

Jaime Fontan
**Head of Acquisitions and
Commissioning Editor**
gfontan@aragontelevision.es
+34876256500

SPAIN



CANAL EXTREMADURA TELEVISION

Canal is an autonomous public channel of Extremadura. It is broadcast in Spanish with regional coverage and free access.

Sociedad Pública de Televisión Extremeña T: 0034924382000
S.A.U.
Avenida de las Américas,
11° 06800 Mérida [Badajoz]
Spain

www.canalextremadura.es

Guillermo Sánchez Castañón
Head of Programmes
guillermosanchez@canalextremadura.es
+34924382000

SPAIN



CANAL SUR

Canal Sur is the main regional autonomous public channel of Andalusia.

Edificio Canal Sur. Avda.
José Gálvez, 1. CP 41092
Isla de la Cartuja,
Seville
Spain

T: 0034955054600

www.canalsur.es

Lidia Lorente
Acquisitions Executive
+34955054773

Fidel Cardete Quintero
Head of Programming

SPAIN



RTV CASTILLA LA MANCHA

CMT is the first public autonomous channel in Castilla-La Mancha.

e / Río Alberche s.n.
Polígono Santa Ma de Banquerencia
Toledo
Spain 45007

T: +34925288600
F: +34925288618
info@rtvcm.es

www.rtvcm.es

Ramón Villaverde
Head Programming
ramonvillaverde@rtvcm.es
+34925287853

SPAIN



EITB – EUSKAL IRRATI ETA TELEBISTA

EITB is the first communication group of Euskadi It has more than 25 years of experience in the communication world. During this time it has consolidated as a modern and efficient media that daily goes over to more than one million citizens, to whom it mainly offers information and entertainment. There are three different channels (ETB 1, ETB 2, ETB 3) The first channels is just in Basque Language.

T: +34946563000
F: +34946563095
info@eitb.com

www.eitb.eus/es/television/

Jesús Higuera
Head of Programming Acquisitions
Higuera_jesus@eitb.com

SPAIN

LA SEXTA – (TELEFILM)

La Sexta is a Spanish private terrestrial generalist channel. When it was launched in 2006, la Sexta became the sixth Spanish national terrestrial channel. La Sexta is controlled by the GAMP (which includes Mediapro) and the mexican group Televisa.

C/ Virgilio nº2, Edificio 4
Ciudad de la Imagen
Pozuelo de Alarcón (Madrid)
Spain

T: +34 91 838 2966
F: +34 91 838 2958
info@lasexta.com
comunicacion@lasexta.com

www.lasexta.com

Enrique Izoano
Acquisitions Manager

Esperanza Martín
Programme Director

SPAIN



TELEVISIÓ DE CATALUNYA

Televisió de Catalunya is an autonomous public channel of Catalonia. It is broadcast in Catalonia, with free access, in Catalan. Televisió de Catalunya deals with six different channels: TV3, 33, 3/24, Esports 3, Super 3 and TV3CAT.

Carrer de la TV3,
Sant Joan Despí, 08970,
Barcelona, Spain

T: +34 934 99 93 33
coproduccions@tv3.cat

www.tv3.cat

Susanna Jiménez
Head of Coproductions
+34934999333
coproduccions@tv3.cat

SPAIN



TELECINCO – GESTEVISION

Telecinco is a Spanish commercial television channel operated by Gestevisión Telecinco. Launched in 1990 as Tele 5, it was the fifth of the national terrestrial television channels. In 1997, Tele 5 was rebranded as Telecinco, dropping the flower logo seen in other Mediaset channel logos. Telecinco is a general channel catering for all audiences. It shows popular films, series and sport.

T: 0034913966999
telecinco@telecinco.es

www.telecinco.es

Ghislain Barois
Acquisitions Director
gbarrois@telecinco.es

Mónica Iturriaga
Acquisitions Manager
miturriaga@telecinco.es

Jorge Tuca
**Director of Development , Foreign
Distribution**
jtuca@telecinco.es

SPAIN



TVE – TELEVISIÓN ESPAÑOLA

Televisión Española –TVE – is the national state-owned public service television broadcaster in Spain.

Prado del Rey
28223 Pozuelo de Alárcon (Madrid)
Spain

T: +34 91.346.80.00
F: +34 91.346.30.55

María Jesús Pérez
**Head of Acquisitions and
Commissioning Editor**
mjesus.perez@rtve.es

SPAIN



SWEDEN

The main players in the Swedish broadcasting market are public broadcaster SVT, private Swedish groups Bonnier (TV4 and C MORE channels) and Modern Times Group – MTG (TV3, TV6, TV8, Viasat Film and Viasat channels, some of which are broadcast from the United Kingdom), and Discovery Networks Sweden, whose channels Kanal 5, Kanal 9 and Kanal 11 are also transmitted from the United Kingdom.

Regarding distribution, the main players in the market remain the Swedish groups MTG, TeliaSonera and Teracom, as well as cable operator Com Hem and the Norwegian Telenor group. Com Hem dominates the cable television market with 1 789 000 homes connected as of September 2013, showing an increase of 41 000 homes if compared to 2012.

As in the other Nordic countries, two satellite packages are in competition in the market: Canal Digital (Telenor) and Viasat (MTG), who each have more than 300 000 subscribers in Sweden.

The Telia platform (TeliaSonera) continues to dominate the IPTV market, having reached 560 000 subscribers for its IPTV service by the end of 2012, 13% more than one year earlier. Thanks to its rapidly growing number of subscribers, Telia is now the third largest pay-TV operator behind Com Hem (cable).

Regarding legal developments, the new Radio and Television Act entered into force on 1 August 2010, transposing the Audiovisual Media Services Directive (2007). The Act defines and regulates sponsorship, advertising and product placement. It also creates a new audiovisual regulatory body, Myndigheten för radio och tv (Swedish Broadcasting Authority), which replaces the radio and television authority (Radio-och TV- Verket, RTVV) and the Swedish audiovisual commission (Granskningsnämnden för radio och TV, GRN).

In June 2013 the Swedish Parliament approved some amendments to the Act on Copyright in Literary and Artistic Works, which entered into force on 1 November 2013, introducing provisions enhancing the application of extended collective licensing, with particular regard to cases of large amounts of copyrighted material used by the same user and when a direct agreement with the right holder is impossible. Nonetheless, it is possible for a rightholder to refuse this kind of exploitation.

In October 2013 the Government presented the Bill “Culture and Accessibility – Public Radio and Television 2014-2019”, containing the guidelines of media policy for public service broadcasting for this period. Particular requirements are imposed as regards the accessibility to the services by people with disabilities: subtitling, sign language interpretation, audio description, and text read aloud.

SOURCE: MAVISE Database
– a database provided by
the European Audiovisual
Observatory on behalf of the DG
Communication of the European
Commission.



Sofia Helin and Dag Malmberg in The Bridge - Season Three which received TV Programming support from Creative Europe (Photo: Carolina Romare)



SVERIGES TELEVISION (SVT)

SVT is the Swedish public service broadcaster financed by a compulsory fee. They had 64 hours of broadcasting per day on all their channels. 26 % of the programming is fiction.

Oxenstiernsgatan 26-34
105 10 Stockholm
Sweden

T: +46 8 784 00 00

www.svt.se

Stephen Mowbray
Head of Fiction acquisition
stephen.mowbray@svt.se

Henrik Palm
Buyer
henrik.palm@svt.se

Magdalena Löfström
Buyer
magdalena.lofstrom@svt.se

Agneta Perman
**Feature Film Buyer / Co-production
Executive**
agneta.perman@svt.se

Helena Ingelsten
**Buyer & Commissioning editor
Swedish Short films**
helena.ingelsten@svt.se

Hanne Palmquist
Commissioning Editor Drama
hanne.palmquist@svt.se

Christian Wikander
Head of Drama
christian.wikander@svt.se

SWEDEN



DISCOVERY NETWORKS SWEDEN

Discovery Networks Sweden — Channels showing drama are Kanal 5, Kanal 9 and Kanal 11. Kanal 5 has an entertainment, feature film and series profile. Kanal 9 targets the male viewer with a mix of high quality drama, sports and feature films. Kanal 11 targets the female viewer with a mix of drama, glamour and relationships.

Rådmansgatan 42
114 99 Stockholm
Sweden

T: 08-520 55 555

www.discoverynetworks.se

Katarina Eriksson
Director of Acquisition
katarina_eriksson@discovery.com
+46852055150

Jon Petersson
Head of Drama Commissioning
jon_petersson@discovery.com
+46852055024

SWEDEN



TV4 / C MORE

TV4 Group started its transmissions in 1990. TV4Group has a range of channels under the TV4 brand. C More (previously known as Canal+) was started by French Canal+ in 1997 and is owned by the Bonnier Group. CMore is a pay TV service with 15 channels.

Tegeluddsvägen 3-5
115 79 Stockholm
Sweden

T: +46 8 459 40 00

www.tv4.se

Cathrine Wiernik
**Director of programs and
acquisitions**
cathrine.wiernik@tv4.se

Bo Thörnwall
Head of programs CMore
bo.thornwall@tv4.se

Josefine Tengblad
Head of drama
josefine.tengblad@tv4.se

Maria Lidén
Senior acquisitions manager
maria.liden@tv4.se

SWEDEN



TV3 / TV6 / TV8 / TV10

TV3 started its transmissions in 1987 and was the first commercial channel in Sweden. It has an entertainment and feature film profile. TV6 has a profile of entertainment, sports and fact shows. TV8 has a focus on series and lifestyle. TV10 focuses on sports and documentaries. These channels are all owned by Viasat which is part of MTG (Modern Times Group).

MTG TV
PO Box 17054
SE-104 62 Stockholm
Sweden

T: +46 (0)8 56 20 23 00

www.mtgtv.se

Karolina Stallwood
**Head of Programme Planning &
Acquisitions MTG TV**
Karolina.stallwood@mtgtv.se

Karin Stjärne
Programme Director
karin.stjarne@mtgtv.se

SWEDEN



VIASAT / VIASAT FILM

Viasat has a range of pay tv documentary and sports channels as well as the eight Viasat Film film channels. Acquisitions for the Nordic market are handled at the London office.

Viasat Broadcasting UK Ltd
Chiswick Green
610 Chiswick High Road
London W4 5RU
UK

+44 208 742 5100

www.viasat.se

Vanda Rapti
**VP, Pay TV, VOD & New Media
Acquisitions and Acting VP Free TV
Nordic Acquisitions**
vanda.rapti@mtg.com

Seniha Tunaboylu
Head of Factual Acquisitions
seniha.tunaboylu@mtg.com

Vicky Watts
**– Senior Acquisitions Manager – VOD
& New Media**
vicky.watts@mtg.com

Camilla Hardymont
**VP of Acquisitions Free and Pay TV
Scandinavia**
camilla.hardymont@mtg.com

SWEDEN

TURNER NORDIC AND BALTIC

Turner Broadcasting System International operates versions of core TBS brands, including CNN, TNT, Cartoon Network and Turner Classic Movies, as well as country- and region-specific networks and businesses in Latin America, EMEA and the Asia Pacific region. It runs Pay- and Free-TV-channels, as well as Internet-based services and is a commercial partner with various third-party media ventures; it teams with Warner Bros. and HBO to leverage Time Warner's global reach. Currently, TBS operates more than 130 channels in more than 30 languages in some 200 countries around the world.

Turner Broadcasting System International, Inc. is a subsidiary of Turner Broadcasting System, Inc. (TBS), a Time Warner company.

Visiting address:

Östhammarsgatan 68, Stockholm

Postal address:

Box 271 34, 102 52 Stockholm, Sweden

T: +46 8 400 100 00

www.turner.com

Steve Hornsey

**Program Director, Turner Nordic and
Baltic**

Steve.Hornsey@turner.com

+44 (0) 207 693 1235

SWEDEN



HBO NORDIC

HBO Nordic was founded in 2012 and offers a subscription Video on Demand Service, directly to consumers in Sweden, Norway, Finland and Denmark. The channel also distributes brand new premieres from other major broadcasters as well as an exciting selection of movies from Hollywood, international film studios, local distributors and independent companies. HBO Nordic is owned by Home Box Office, Inc., a subsidiary of Time Warner Inc.

Kungsträdgårdsgatan 20
11147 Stockholm, Sweden

www.hbonordic.com

Ragnhild Thorbech
Senior Vice President Acquisitions
Ragnhild.thorbech@hbo.com

Caroline Dinkelspiel
Vice President Acquisitions
Caroline.dinkelspiel@hbo.com

SWEDEN



SWITZERLAND

Switzerland is a federation made up of 26 cantons and has four national languages: French, German, Italian and Romansch. This is reflected in the organisation of the audiovisual landscape, with French, German and Italian channels having a major presence on the Swiss market.

However, the different language markets are still dominated by the public channels. The public service broadcaster SRG SSR idée suisse provides through its seven operating units seven television channels (three in German, two in French and two in Italian) and seventeen radio stations.

On 29 May 2013, the Federal Council (the Swiss government) issued a message to the Parliament on the partial revision of the Radio and Television Broadcasting Act, providing for the public radio and television service to be financed in the future by an “appropriate and practical” licence fee. With some exceptions, all households and companies are to pay the new fee, which will replace the former licence and be slightly less expensive. The change in the system was welcomed by a majority at the consultation stage. The draft legislation also provides for more flexibility and for simplified procedures for granting concessions to private radio and television stations.

Switzerland has 13 private regional television channels. In December 2013, the regulator OFCOM published the results of a study carried out on public satisfaction with regard to the range of TV channels available. The SSR TV programmes appealed to 60% of those questioned, while just 50% of the public gave the regional TV channels a positive rating. Viewers’ criticism mainly concerned the quality of programme production and the poor entertainment value. For almost all the criteria mentioned, the private TV channels were rated less favourably than the SSR radio and television stations and local private radio stations.



RSI

RSI is part of the group SRG SSR, the Swiss public broadcaster. The Italian unit operates two channels: LA 1 and LA 2. LA 1 is a full service channel aimed at a broad audience. LA 2 is a complementary channel with a focus on sport. There are also children's programs and repeats of news programs from LA 1. The drama editorial line looks for strong and realistic fiction stories. RSI also participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions, both for cinema and television.

Casella Postale
6903 Lugano
Switzerland

T: +41 (0)91 803 51 11
F: +41 (0)91 803 53 55

www.rsi.ch

Dino Balestra
Director

Gabriella de Gara
**Head of fiction / Co-productions
fiction**
gabriella.degara@rsi.ch
+41 (0)91 803 53 04

Silvana Carminati
Acquisitions fiction
silvana.carminati@rsi.ch
+41 (0)91 803 54 56

Walter Bortolotti
**Head of animation and acquisition
short films**
walter.bortolotti@rsi.ch
+41 (0)91 803 54 70

SWITZERLAND



RTS

RTS is the national French speaking language public service channel in Switzerland. It operates two channels. RTS 1 is a mainstream channel. The prime-time schedule showcases its major in-house productions. RTS 2 complements RTS 1 with sports coverage, documentaries, arts programming and a special strand for young people. RTS also participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions both for cinema and television.

Quai Ernest-Ansermet 20
Case postale 234
1211 Geneva 8
Switzerland

T: +41 (0)58 236 36 36

www.rts.ch

Gilles Marchand
Director

Françoise Mayor
Head of fiction
francoise.mayor@rts.ch
+41 (0)58 236 95 77

Isabell Hagemann Pouliquen
Acquisitions fiction
isabell.hagemann-pouliquen@rts.ch
+41 (0)58 236 95 46

Izabel Rieben
**Head of youth programs and expert
for animations**
izabel.rieben@rts.ch
+41 (0)58 236 36 36

SWITZERLAND

SRF

SRF is the German language public service channel in Switzerland and operates three television channels. SRF 1 – a high-quality schedule of news and current affairs, light entertainment and arts, with a large proportion of in-house productions – reflects the complex reality of life in culturally diverse Switzerland. SRF zwei gives heavy emphasis to sport, feature films and series. The schedule is aimed more at a younger audience. SRF info offers viewers time-shifted viewing with running repeats of the latest information-based formats - news, sport and the arts. SRF participates in foreign productions involving a Swiss co-producer within the “Pacte”, an agreement aiming to support independent productions both for cinema and television.

Fernsehstrasse 1-4
8052 Zürich
Switzerland

T: +41 (0)44 305 33 11
F: +41 (0)44 305 56 00

www.srf.ch

Rudolf Matter
Director

Urs Fitze
**Head of Fiction / Co-productions
fiction**
urs.fitze@srf.ch
+41 (0)44 305 58 23

Bettina Alber
In house series
bettina.alber@srf.ch
+41 (0)44 305 59 18

Tamara Mattle
Feature Film
tamara.mattle@srf.ch
+41 (0) 44 305 63 38

Lilian Räber
TV Movies
lilian.raeber@srf.ch
+41 (0)44 305 63 77

Esther Rutschmann
Head of administrative department
esther.rutschmann@srf.ch
+41 (0) 44 305 63 09

Heinz Schweizer
Head of acquisitions fiction
heinz.schweizer@srf.ch
+41 (0)44 305 63 44

SWITZERLAND



UNITED KINGDOM

The television market in the UK has undergone one of its most transformative periods in many years.

US media giant Viacom, which owns MTV and Nickelodeon, acquired free-to-air broadcaster Channel 5 for £450m in May 2014, giving it one of the most prestigious channel slots, while international factual broadcaster Discovery and cable giant Liberty teamed up to buy superindie producer All3Media, which makes series including Gogglebox and Midsomer Murders.

Meanwhile, ITV launched two channels, female skewing ITVBe and pay-TV network Encore, its first channel launches since 2006, Sony bought 16 ad-supported channels including True Drama and A+E Networks launched Lifetime.

ITV also recorded ratings growth during 2013 with gains of 3.1% thanks to hits such as Broadchurch and I'm A Celebrity, Get Me out Of Here.

Channel 4 has seen increased investment in international drama co-productions, appointing Simon Maxwell as Head of International Drama to commission a slate of high quality, ambitious drama co-productions that embody Channel 4's distinctive values and have international appeal.

Sky 1, which continues to commission big-budget drama as part of an annual £600m original programming commitment, saw a ratings rise of 4.3%, compared to a 10% decline the year before. However, BBC1 was down to a 21.1% share and Channel's share tumbled 11.4% to 5.8%.

The other main development over the last twelve months was the introduction of the high-end TV tax credit. The move, which meant that dramas with budgets over £1m qualified for a tax break, saw more than 40 TV productions with a total TV spend of almost £400m benefited. Shows such as Game of Thrones and 24: Live Another Day were among 13 international productions made in the UK, while a further 30 UK productions including BBC1's Atlantis, Call The Midwife and Sky's medical drama Critical qualified.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



Hinterland, 2014 – Production company: Fiction Factory



Jamaica Inn, 2014 – Production company: Origin Pictures



BBC

The BBC is the largest broadcasting organisation in the world. Its mission is to enrich people's lives with programmes that inform, educate and entertain. It is a public service broadcaster, established by a Royal Charter and funded by the licence fee that is paid by UK households. The BBC uses the income from the licence fee to provide services including 8 national TV channels plus regional programming, 10 national radio stations, 40 local radio stations and an extensive website. BBC World Service broadcasts to the world on radio, on TV and online, providing news and information in 32 languages. It is funded by a government grant, not from the licence fee. The BBC also has a commercial arm, BBC Worldwide. Its profits are returned to the BBC for investment in new programming and services.

Zone A, Floor 7
BBC Broadcasting House
Portland Place
London, W1A 1AA

BBC Childrens
2nd Floor, BBC Bridge House
Media City UK
Salford,
M50 2BH

www.bbc.co.uk

Sue Deeks
**Head of Programme Acquisition,
Responsible for Feature Films &
Series (Fiction) Acquisitions**
sue.deeks@bbc.co.uk
Assistant: Lisa Morgan
Lisa.morgan@bbc.co.uk
020 3614 2983

Sarah Muller
**Head of Drama Development &
Acquisitions, CBBC – Responsible
for CBBC Acquisitions and Drama
submissions from credited TV
writers without backing from an
Independent Production Company**
Sarah.muller@bbc.co.uk

UNITED KINGDOM



BBC INDEPENDENT DRAMA

New Broadcasting House,
7th floor Zone A,
Portland Place,
London W1A 1AA

www.bbc.co.uk/commissioning

Polly Hill
Controller of Drama Commissioning
polly.hill@bbc.co.uk
Assistant: Ayela Butt
ayela.butt@bbc.co.uk

Elizabeth Kilgariff
Commissioning Editor
Elizabeth.kilgariff@bbc.co.uk
Assistant: Laura Cullum
Laura.Cullum@bbc.co.uk
020 3614 0925

Lucy Richer
Commissioning Editor
lucy.richer@bbc.co.uk
Assistant: Laura Cullum
Laura.Cullum@bbc.co.uk
020 3614 0925

Matthew Read
**Commissioning Editor,
BBC Independent Drama**
matthew.read@bbc.co.uk
Assistant: Barbara Erskine
Barbara.erskine@bbc.co.uk
020 3614 2662

UNITED KINGDOM



Susie Watson

Development Co-ordinator

(020) 3 164 0926

UNITED KINGDOM



BBC WALES

BBC Cymru Wales (also known as English: BBC Wales or Welsh: BBC Cymru) is a division of the British Broadcasting Corporation for Wales. Based at Broadcasting House in the Llandaff area of Cardiff, it directly employs over 1200 people, and produces a broad range of television, radio and online services in both the Welsh and English languages. Outside London, BBC Wales is the largest BBC production centre in the United Kingdom, partly due to its additional slate of Welsh language programmes for BBC Radio Cymru and the Welsh language television channel S4C.

Drama Zone 2
BBC Cymru/Wales,
Roath Lock,
Porth Teigr,
Cardiff, CF10 4GA
Wales

www.bbc.co.uk/wales

Faith Penhale

Head of Drama, BBC Wales

Assistant: Andrea Fleming

029 20 769536

andrea.fleming@bbc.co.uk

*For all Wales proposals and
e-commissioning queries please contact:*

Emma Genders

emma.genders@bbc.co.uk

020 3614 0281

UNITED KINGDOM



BBC NORTHERN IRELAND

BBC Northern Ireland (Irish: BBC Thuaisceart Éireann / Ulster Scots: BBC Norlin Airlann) is the main public service broadcaster in Northern Ireland. The organisation is one of the three national regions of the BBC, together with BBC Scotland and BBC Wales. Based at Broadcasting House, Belfast, it provides television, radio, online and interactive television content. BBC Northern Ireland currently employs 700 people, largely in Belfast.

Room 3.07 Blackstaff House,
62-66 Great Victoria Street,
Belfast BT2 7BB

T: +44 28 9033 8845

www.bbc.co.uk/northernireland

Sarah Stack
**Senior Script Executive, BBC
Northern Ireland Drama**
sarah.stack@bbc.co.uk
+44 28 9033 8845

Stephen Wright
**Head of Drama, BBC Northern
Ireland**
stephen.wright@bbc.co.uk
Assistant: Bronagh Taylor
+44 28 90 338845

UNITED KINGDOM



BBC SCOTLAND

BBC Scotland (Gaelic: BBC Alba) is a constituent part of the British Broadcasting Corporation, the publicly-funded broadcaster of the United Kingdom. It is, in effect, the national broadcaster for Scotland, having a considerable amount of autonomy from the BBC's London headquarters, and is run by the BBC Trust, who are advised in Scotland by the Audience Council Scotland. Its Scottish headquarters and studios are at BBC Pacific Quay on the south bank of the River Clyde, beside the STV headquarters and the Glasgow Science Centre.

Zone 2.07
BBC Scotland,
40 Pacific Quay.
Glasgow G51 1DA

T: 0141 422 6000

www.bbc.co.uk/scotland

Christopher Aird
Head of Drama, BBC Scotland

Christopher.Aird@bbc.co.uk

+ 44 141 422 6083

*For all proposals and e-commissioning
queries please contact:*

Audrey McFadden

Audrey.McFadden@bbc.co.uk

(0141) 422 6081

UNITED KINGDOM

CHANNEL 4

Channel 4 is a public service for information, education and entertainment. The Broadcasting Act 1990 requires that Channel 4 programmes shall: appeal to tastes and interests not generally catered for by ITV, encourage innovation and experiment, be distinctive, maintain a high general standard and a wide range, include a proportion which are educational, provide high quality news and current affairs, include proportions which are European and are supplied by independent producers.

124 Horseferry Road,
London SW1P 2TX

T: +44 020 7396 4444

www.channel4.com

Piers Wenger

Head of Drama

PWenger@channel4.co.uk

Assistant: Jessica Cobham-Dineen
JCobham-Dineen@Channel4.co.uk
020 7306 3647

Beth Willis

Deputy Head of Drama

BWillis@channel4.co.uk

Assistant: Jessica Cobham-Dineen
JCobham-Dineen@Channel4.co.uk
020 7306 3647

Simon Maxwell

Head of International Drama

SMaxwell@channel4.co.uk

Assistant: Amanda Lee
ACLee@channel4.co.uk

Roberto Troni

Commissioning Editor

rtroni@channel4.co.uk

Assistant: Jessica Cobham-Dineen
JCobham-Dineen@Channel4.co.uk
020 7306 3647

Surian Fletcher-Jones

Head of Development

SFletcherJones@channel4.co.uk

Programme Coordinator: Sian Robins
Grace
020 7306 8305
Assistant: Amanda Lee
ACLee@channel4.co.uk

Nick Lee

Acquisitions Manager

nlee@channel4.co.uk

Lee Mason

Commissioning Editor, Pre-Watershed Drama

LEMason@Channel4.co.uk
Assistant: Amanda Lee
ACLee@channel4.co.uk

David Kosse

Director of Film4

dkosse@channel4.co.uk
Assistant: Claire Willats
CWillats@Channel4.co.uk

UNITED KINGDOM



CHANNEL 5

Channel 5 launched as Britain's fifth public service channel in March 1997. It reaches 4 in 5 of the UK viewing public each month with a broad mix of popular content including Suspects, Big Brother and Neighbours. Sister channels 5*, 5USA and Spike complement Channel 5 with a mix of original commissions and acquired entertainment and U.S. drama, while Demand 5 is a free catch service available across multiple platforms and devices. In 2014, Channel 5 was the only major commercial free-to-air network to grow audience share across the most valuable TV audiences. Since September 2014, Channel 5 has been owned by Viacom International Media Networks.

The Northern & Shell Building
10 Lower Thames Street
London, EC3R 6EN

T: 020 8612 7700

www.channel5.com

Ben Frow
Director of Programming
Ben.Frow@channel5.com

Greg Barnett
**Commissioning Editor for
Entertainment, Daytime & Soap**
greg.barnett@channel5.com

Katie Keenan
Head of Acquisitions
Katie.keenan@channel5.com

Marie-Claire Dunlop
Acquisitions & Channel Manager
Marie-Claire.Dunlop@channel5.com
0208 612 7639

UNITED KINGDOM



ITV is the biggest commercial television network in the UK, broadcasting the most talked about television and making a major contribution to the UK's culture, economy and communities. The ITV Network is made up of 15 regional licences, providing television to viewers across the UK. 11 of the licences in England and Wales are owned by ITV Plc, formed in 2004 following the merger of Carlton and Granada. SMG owns the two Scottish licences, Scottish Television and Grampian; UTV and Channel Television own the licences for Northern Ireland and the Channel Islands respectively.

ITV
Upper Ground
London, SE1 9LT

T: 020 7157 3000

www.itv.com

Steve November
Director of Drama
Steve.november@itv.com
Assistant: Sarah Jackson
Sarah.jackson@itv.com
020 7157 6434

Victoria Fea
Controller of Drama
Victoria.fea@itv.com
020 7157 3000

Charlie Hampton
Commissioning Editor, Drama
Charlie.hampton@itv.com
020 7157 6438
Currently on maternity leave, covered by:
Sarah Conroy
Sarah.conroy@itv.com

Jane Hudson
Head of Drama Series
Jane.hudson@itv.com
020 7157 3000

UNITED KINGDOM



SKY

Sky One is an entertainment channel (with simulcast in HD). In addition to providing a television satellite service to subscribers (over 9.3 million households at the end of March 2011), BSKYB also has a portfolio of TV channels: Sky1, Sky Living, Sky Atlantic, Sky Arts 1 & Sky Arts 2, Sky 3D and Challenge.

Grant Way,
Isleworth,
Middlesex TW7 5QD

T: 0333 100 0333

www.skyone.co.uk

Sarah Wright
Controller of Acquisitions
sarah.wright@sky.uk
0207 032 0343

Anne Mensah
Head of Drama
Anne.Mensah@sky.uk
0207 0320304

Cameron Roach
Commissioning Editor
cameron.roach@sky.uk

Lucy Criddle
Senior Acquisitions Manager
lucy.criddle@sky.uk
0207 0320357

Michael Whelan,
Acquisitions Manager
Michael.whelan@sky.uk
0207 0323521

Beverley Booker
Head of Development
Beverley.booker@sky.uk

UNITED KINGDOM



UKTV

UKTV is a major industry player and one of the most important and successful multi-channel providers in the UK. Formed in 1997, it is an independent commercial joint venture, between Scripps Networks Interactive, Inc. (SNI) and BBC Worldwide, the commercial arm of the BBC. Attracting over 42 million viewers each month, the network offers a broad range of quality programming across its entertainment, lifestyle and factual offerings - Watch, GOLD, Dave, Alibi, Eden, Drama Yesterday, Home, Really and Good Food. The success of UKTV is based on its programming including award-winning shows from the BBC and an increasing number of original commissions and acquisitions. The network embraces technology to deliver inspired channels to audiences through Freeview, Sky, Virgin Media, BT, TalkTalk, YouView and UKTV Play, and distributes its highly valued original programmes to 200 territories.

10 Hammersmith Grove
London, W6 7AP

T: +44 20 72996200

www.uktv.co.uk

Simon Lupton
Senior Commissioning Editor
simon.lupton@uktv.co.uk
2037527796

Alexandra Finlay
**Head of Acquisitions and
Co-Productions**
alexandra.finlay@uktv.co.uk
020 7299 6172

Richard Watsham
Director of Commissioning
Richard.watsham@uktv.co.uk
020 7299 6291

Tanya Qureshi
Development Producer
Tanya.Qureshi@uktv.co.uk
020 7299 6179

UNITED KINGDOM



S4C

S4C has a statutory obligation to broadcast to a majority of Welsh language output during peak viewing hours (1800 – 2200). The schedule provides a wide variety of popular TV – drama, entertainment, sports, music, news and current affairs, games and quizzes, youth and children's programming.

Parc Ty Glas,
Llanishen,
Cardiff CF14 5DU

T: +44 (0) 29 20 747 444

www.s4c.co.uk

Gwawr Martha Lloyd
Commissioner for Drama Content
Gwawr.lloyd@s4c.co.uk

Catrin Siriol
Content Departmental Assistant/PA
Catrin.siriol@s4c.co.uk
+ 44 (0) 29 20 741 467

UNITED KINGDOM

CREATIVE EUROPE DESKS CONTACT DETAILS

AUSTRIA

Creative Europe Desk-MEDIA
Esther Krausz
Austrian Film Institute
Stiftgasse 6 - 1070 Vienna
info@mediadeskaustria.eu
Tel.: +43 1 526 9730 406

BELGIUM

Creative Europe Media Desk Vlaanderen
Marie Renier and Joyce Palmers
Departement Cultuur, Jeugd, Sport en Media
Arenbergstraat 9 - B1000 Brussels
creativeeuropemedia@vlaanderen.be
Tel.: +32 2 553 41 07
Fax: +322 553 69 59

Ministère de la Fédération Wallonie-Bruxelles
Stéphanie Leempoels
Bd Léopold II 44 - 1080 Bruxelles
stephanie.leempoels@cfwb.be
media@europecreative.be
Tel.: +32 2 413 34 91
www.europecreative.be

BULGARIA

Bulgarian National Film Centre
Kamen Balkanski
2A, Dondukov Blvd (last floor)
Sofia 1000 / Bulgaria
info@mediadesk.bg
Tel.: +359 2 9883224
www.creativeeurope.bg

CROATIA

Croatian Audiovisual Centre
Creative Europe Desk
Martina Petrovic
Kralja Zvonimira 20, 10 000 Zagreb
martina.petrovi@mediadesk.hr
Tel. +385 146 55 434 / 91 46 55 440
Fax +385 1 46 55 442
www.mediadesk.hr

REPUBLIC OF CYPRUS

Creative Europe Desk Cyprus
RTD TALOS, 1 Diogenous Street, Block "A", 4th
floor, 2404 Nicosia, Cyprus
Mr. Stelios STYLIANOU
ss@talos-rtd.com
Tel: +357-22454333 · Fax: +35722660009
www.ced-cyprus.org

CZECH REPUBLIC

National Film Archive
Pavlina Kalandrova
Narodni 28, 110 00 Praha 1
pavlina.kalandrova@kreativnievropa.eu
Tel.: +420 221 105 210
GSM: +420 606 622 201
Fax: +420 221 105 303

DENMARK

Danish Film Institute - Creative Europe Desk/
MEDIA
Ms Ene Katrine Rasmussen and Mai-
ken Høj Gothersgade 55, DK-1123 København
ener@dfi.dk
creativeeurope@dfi.dk
Tel. (45) 20 47 02 90 / 33 74 34 42

ESTONIA

Eesti Filmi Instituut (Estonian Film Institute)
Ms. Katre Kaja
Uus Street 3, Tallinn 10111
Tel.: +372 627 6065
Mobile: 372 56 609 603
media@looveuroopa.ee
http://www.looveuroopa.ee/

FINLAND

Finnish Film Foundation
Kerstin Degerman
Kanavakatu 12, 00160 Helsinki
kerstin.degerman@ses.fi
Tel.: +358 9 6220 3013
Fax: +358 9 6220 3050

FRANCE

MEDIA Sub-programme
Relais - Culture - Europe
Liliane Crosnier
132, rue du Faubourg Saint Denis
75010 Paris - France
infos@europecreativefrance.eu
Tel. (33-1) 53 40 95 10
Fax (33-1) 53 40 95 19
www.europecreativefrance.eu

MEDIA Sub-programme - Office Strasbourg
Ville et Communauté urbaine de Strasbourg
Aurélié Réveillaud
1, parc de l'Etoile, F-67076 Strasbourg
media@strasbourg.eu
Tel.: (33-3) 88 60 95 89
Fax: (33-3) 88 60 98 57
www.mediafrance.eu/Strasbourg

GERMANY

Creative Europe Office Hamburg
Christiane Siemen
Friedensallee 14-16, 22765 Hamburg
info@ced-hamburg.eu
Tel. (49) 40 390 65 85
www.facebook.com/MEDIADeutschland
www.creative-europe-desk.de

Creative Europe Office München
Ingeborg Degener
Sonnenstrasse 21, D-80331 München
info@ced-muenchen.eu
Tel. (49) 89 54 46 03 30
Fax: (49) 89 54 46 03 40
www.creative-europe-desk.de

Creative Europe Office Düsseldorf
Creative Europe Desk NRW
Heike Meyer-Döring
c/o Film- und Medienstiftung NRW
GmbH Kaistraße 14, D-40221 Düsseldorf
info@ced-nrw.eu
Tel. (49) 211 930 50 14
Fax: (49) 211 93 05 05
www.creative-europe-desk.de

Creative Europe Office Berlin-Brandenburg
Susanne Schmitt
August-Bebel-Strasse, 26-53, D-14482
Potsdam
info@ced-bb.eu
Tel. (49) 331 743 87 50
Fax: (49) 331 743 87 59
www.creative-europe-desk.de

GREECE

Greek Film Center
Anna Kasimati
7 Areopagitou str, 11742 Athens, Greece
anna.kasimati@gfc.gr
Tel. (+30) 210 3678512
Fax (+30) 210 3648269

HUNGARY

Kreatív Európa Nonprofit Kft.
Mr Ádám Paszternák
H-1145 Budapest, Róna u. 174. I ép. III/304
adam.paszternak@kreativeuropa.hu
Tel: (36-1) 300 7202
www.kreativeuropa.hu

ICELAND

RANNIS- The Icelandic Centre for Research
Sigríður Margrét Vigfúsdóttir
Dunhagi 5, 107 Reykjavík
sigridur.margret.vigfusdottir@rannis.is

IRELAND

MEDIA Office
Orla Clancy
Callaghan House
13-16 Dame St., Dublin 2, Ireland
Media@creativeeuropeireland.eu
Tel: +353 1 6791856

MEDIA Office Galway
Eibhlín Ní Mhunghaile
Creative Europe Desk Galway
Cluain Mhuire Monivea Road, Galway
eibhlin@creativeeuropeireland.eu
Tel. (353) 91 77 07 28
Fax (353) 91 77 07 46

ITALY

MEDIA Office Roma
Giuseppe Massaro
Via Tuscolana 1055, 00173 Roma
roma@media-italia.eu
Tel.: 39 06 72286409
Fax: 39 06 7221127

MEDIA Office Torino
Silvia Sandrone
Via Cagliari 42, 10153 Torino
torino@media-italia.eu
Tel.: 39 011 53 98 53
Fax: 39 011 53 14 90

c/o Istituto Luce Cinecittà srl
MEDIA Office Bari
Cristina Piscitelli
Lungomare Starita 1 - 70132 Bari
bari@media-italia.eu
Tel +39 080 9752900
Fax +39 080 9147464

LATVIA

National Film Centre
Lelda Ozola
Pietavas 10 Riga, LV 1050
lelda.ozola@nfc.gov.lv
Tel.: +371 6735 8857
Skype: leldamediadesk
www.creativeeuropelatvia.eu

LITHUANIA

Lithuanian Film Centre
Eva Brazdžionytė
Z. Sierakausko g; 15 LT 03105 Vilnius
media@kurybiskaeuropa.eu
Tel: +370 / 5 213 06 43 / 5 213 07 53
Fax: +370 / 6 803 50 42

LUXEMBOURG

Carole Kremer
Film Fund Luxembourg,
5, Rue Large,
L-1917 Luxembourg
Carole.Kremer@creative-europe.etat.lu
Tel: (+ 352) 247 82197
Fax: (+ 352) 22 09 63
www.creative-europe.lu

MALTA

Lisa Gwen Baldacchino
Head, Creative Europe Desk
Culture Directorate
Chateau de la Ville
21 Archbishop Street
Valletta, VLT 1170
lisa-gwen.baldacchino@gov.mt
Tel: (+ 356) 2567 4209

THE NETHERLANDS

Creative Europe Desk NL/DutchCulture –
centre for international cooperation
Andrea Posthuma
Postbus 15648, 1001 NC Amsterdam – Heren-
gracht 474 – 1017 CA Amsterdam
MEDIA@creativeeuropedesk.nl
Tel.: +31 / 20 6164 225

NORWAY

Norwegian film Institute
Kåre Jensen
PO 482 Sentrum, NO 0105 Oslo
Visitor address: Dronningens gate 16, 0152 Oslo
Kare.jensen@nfi.no
Tel.: +47 90 29 01 95

POLAND

Creative Europe Desk Poland
Al. Ujazdowskie 41 00-540 Warszawa (War-
saw) - Poland
info@kreatywna-europa.eu
www.kreatywna-europa.eu
Tel.: (+48 22) 44 76 180 / 172

PORTUGAL

Centro de Informacao Europa Criativa
Manuel Claro
Rua Luís Pastor de Macedo, 23A, edificio TOBIS,
1750-156 Lisboa
Tel.: +351 21 323 08 00
manuel.claro@europacriativa.eu
www.europacriativa.eu

ROMANIA

Ministry of Culture - Project Management Unit
22 Unirii Blv, 030833 Bucharest - Romania
Valentina Miú – Coordinator MEDIA Sub-
programme
valentina.miu@europa-creativa.eu
info@media-romania.eu
Tel.: +40.21.316.60.61
www.media-romania.euu

SLOVAKIA

Slovak Film Institute
Vladimir Stric
Grösslingová 32, 811 09 Bratislava 1 - Slovakia
Tel.: + 412 2 526 36 935
Fax: +421 2 526 36 936
Info@mediadesk.sk

SLOVENIA

Creative Europe Desk Slovenia
Sabina Briški- MEDIA sub-programme
MOTOVILA, Centre for the promotion of
cooperation in the cultural and creative sectors
Upravna hiša SEM, Metelkova 2,
SI-1000 Ljubljana
Tel.: +386 (0)1 300 87 87
www.media.ced-slovenia.eu
sabina.briski@ced-slovenia.eu

SPAIN

MEDIA Office Spain
Luis Buñuel, 2-2ª
Ciudad de la Imagen
E-28223 Pozuelo de Alarcón
Tel.: +34 91 512 01 78 - G: 836 48048
info@oficinamediaespana.eu
www.oficinamediaespana.eu

Creative Europe Desk-MEDIA Catalunya
Ptge de la Banca 1-3, 1a planta
08002 Barcelona
Mr. Àlex Navarro
Ptge de la Banca 1-3, 1a planta 08002
Barcelona
Tel: (34) 93 552 49 49/48
europacreativamedia@gencat.cat
www.europacreativamedia.cat

Europa Creativa Desk MEDIA Euskadi
Paseo Colon, 16
E-20002 Donostia
Ms Ainhoa Gonzalez Sanchiz
Tel.: +34 94 332 68 37
info@europacreativaeuskadi.eu
www.europacreativaeuskadi.eu

Creative Europe MEDIA Desk Andalucía
Agencia Andaluza de Instituciones Culturales
Edificio Estadio Olímpico. Puerta M -
41092 Isla de la Cartuja (Sevilla)
Ms Victoria Fernández Andrino
Tel.: +34 955 929 047
info@europacreativaandalucia.es
www.europacreativaandalucia.es

SWEDEN

Swedish Film Institute (Svenska Filminstitutet)
Ulrika Nisell
Filmhuset, Borgvägen 1-5,
P.O. Box 27126, SE-102 52 Stockholm - Sweden
ulrika.nisell@sfi.se
Tel.: (46-8) 665 12 05
www.kreativaeuropa.eu

SWITZERLAND

MEDIA Desk Switzerland
Corinna Marschall
Neugasse 6, 8005 Zürich
Tel. (41) 43 960 39 29
info@mediadesk.ch
www.mediadesk.ch

UNITED KINGDOM

Creative Europe Desk UK
Agnieszka Moody
c/o BFI, 21 Stephen Street, London, W1T 1LN
England@mediadeskuk.eu
Tel: + 44 (0) 207 173 3221

Creative Europe Desk UK – Scotland
Emma Valentine
c/o Creative Scotland, 249 West George Street,
Glasgow, G2 4QE
emma.valentine@creativescotland.com
Tel: +44 (0) 141 302 1776

Creative Europe Desk UK – Wales
Judy Wasdell
Department for Economy, Science and
Transport,
Welsh Government
4th Floor, Bayside, St Line House
Mount Stuart Square
Cardiff Bay CF10 5LR
wales@mediadeskuk.eu
+44 (0) 7554 434034

Creative Europe Desk UK – Northern Ireland
Shauna McNeilly
European Engagement Officer
Arts Council Northern Ireland
MacNeice House
77 Malone Rd
Belfast BT9 6AQ
+44 (0) 289 038 5200
smcneilly@artscouncil-ni.org



Creative
Europe
MEDIA